

progressive

# Cycling Scotland

## Attitudes and Behaviours towards Cycling in Scotland – Wave 5

November 2023



# Contents



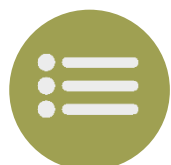
Project background



Bike ownership



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Segmentation analysis



Method



Cycling behaviours



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# Project background

Cycling Scotland is working towards a future in which everyone in Scotland can easily enjoy the benefits of regular cycling.

While rates of cycling in the Scottish population have increased in recent years, a large proportion continue to be reluctant to take up cycling for transport or leisure.

Much research has been conducted investigating cycling attitudes and behaviours, however, before 2017 no specific Scottish population-wide longitudinal research into cycling behaviours and attitudes had been undertaken.

The logo for Cycling Scotland is centered on the page. It consists of the words "Cycling" and "Scotland" stacked vertically in a bold, blue, sans-serif font. A small red dot is positioned above the letter 'i' in "Cycling". The logo is enclosed within a thick, olive-green circular border. Six thin grey lines radiate from the center of the circle to the text blocks on the left and right sides of the slide.

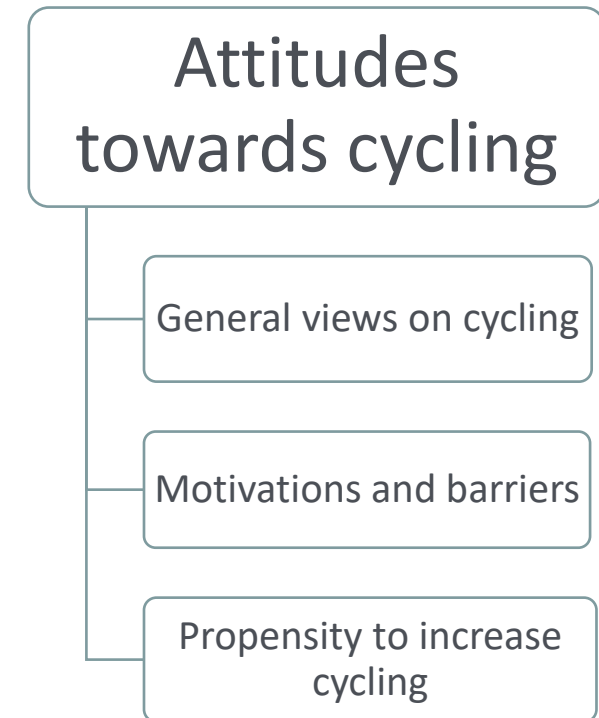
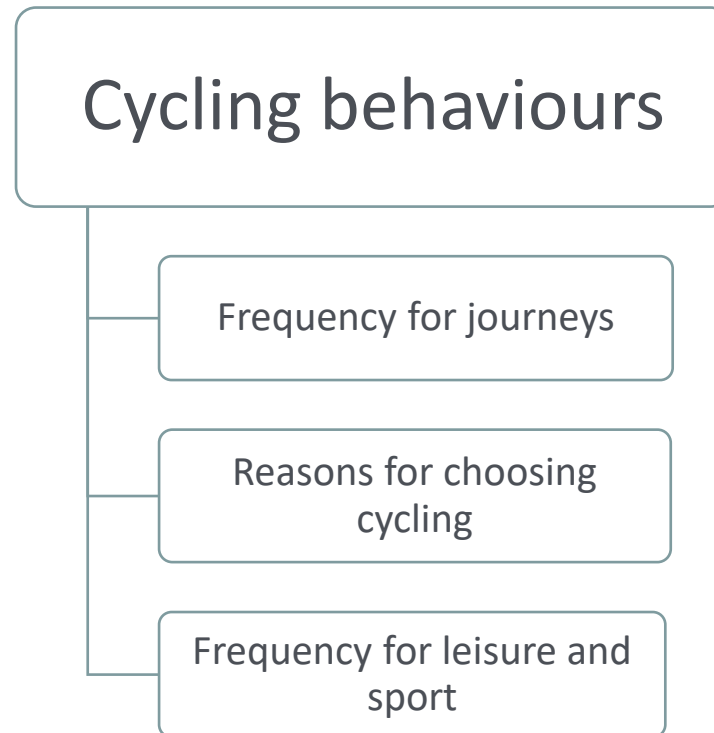
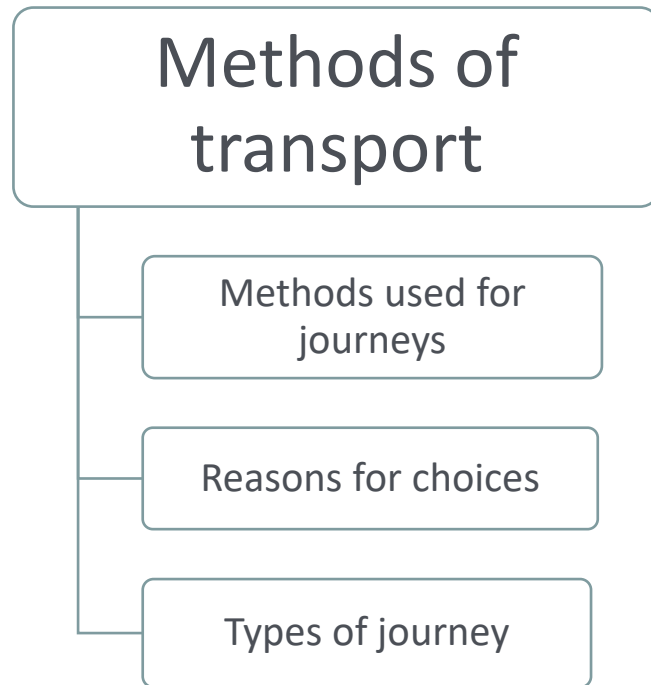
**Cycling  
Scotland**

Cycling Scotland commissioned a long-term research study to:

- consult the full breadth of the Scottish population;
- gather data on perceptions of and barriers to cycling;
- provide effective and implementable recommendations for action.

Progressive conducted the first three waves of research in 2017, 2019 and 2021. Due to the need for regular data on cycling attitudes, the project is now running every year, with this report focusing on findings from the 5<sup>th</sup> wave of the survey, completed in September 2023.

# Key objectives



# Method

Data was gathered using face-to-face in-street CAPI interviews

## Wave 5

The method replicated previous – face-to-face in-street interviews

Sample size: 1020 interviews were conducted

Each interview was approximately 12 minutes long

The sample was gathered from across Scotland. Most Scottish local authorities were included.

Quotas were set on demographics (age, gender, socio-economic group) to ensure a sample representative of the Scottish population.

Fieldwork was conducted between 20<sup>th</sup> September and 11<sup>th</sup> October 2023.



The margin of error on a sample of 1020 is between +/- 0.61% and +/- 3.07% at the 95% confidence interval.\*


Please note: throughout this report men include trans men and women include trans women.

\* As quotas were used the sampling type is non-probability. The margin of error is calculated on the basis of an equivalent probability sample.

# Data Analysis

Only **statistically significant** differences are reported (at 95% confidence interval)

Statistically significant differences between waves of research on charts are noted with  or 

Where base sizes are low a caution sign is shown.   
**These results must be read with caution**

Where figures do not add to 100% this is due to multi-coded responses or rounding

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# Bike ownership

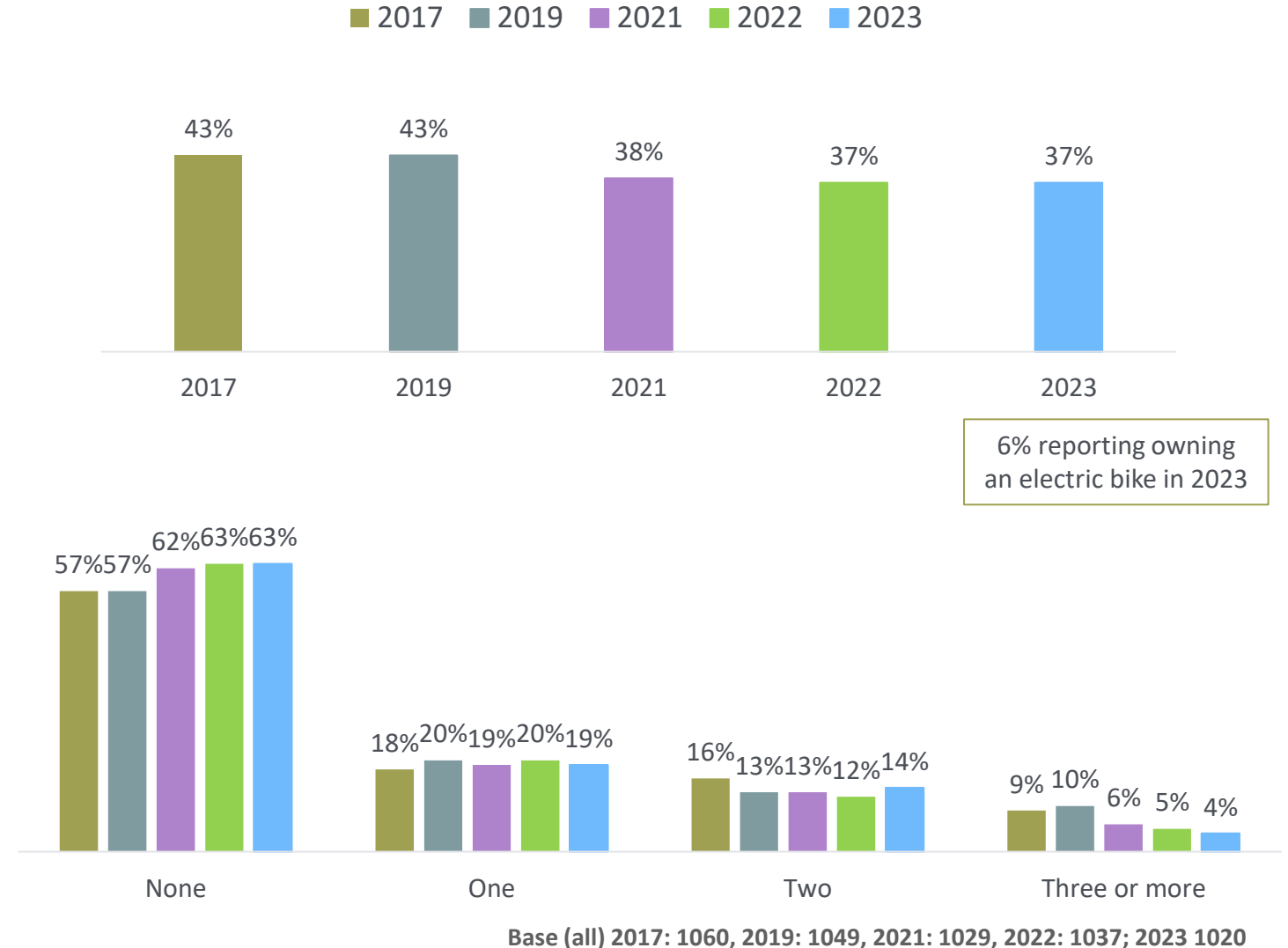
# Bicycle ownership

- Over one in three (37%) respondents in 2023 reported having access to an adult bike (exc. electric bikes) in their household.
- This is consistent with findings in 2021 and 2022 (38% and 37%), but lower than the proportion with access to a bike in the household in 2017 and 2019 (both 43%).
- This year, men were more likely to have access to a bike than women (43% v 31%); this was also true for those in ABC1 socio-economic groups compared to C2DE (44% v 29%).
- Respondents were also asked if they have an electric bike available within their household. In total, 6% reported that they do, which is a slight increase from 2022 (4%).

Q17. How many adult bicycles do you own (excluding electric bikes), or are available for use in your household?

Q18. How many electric bikes do you own, or are available for use in your household?

## Adults bikes (exc. electric) in household

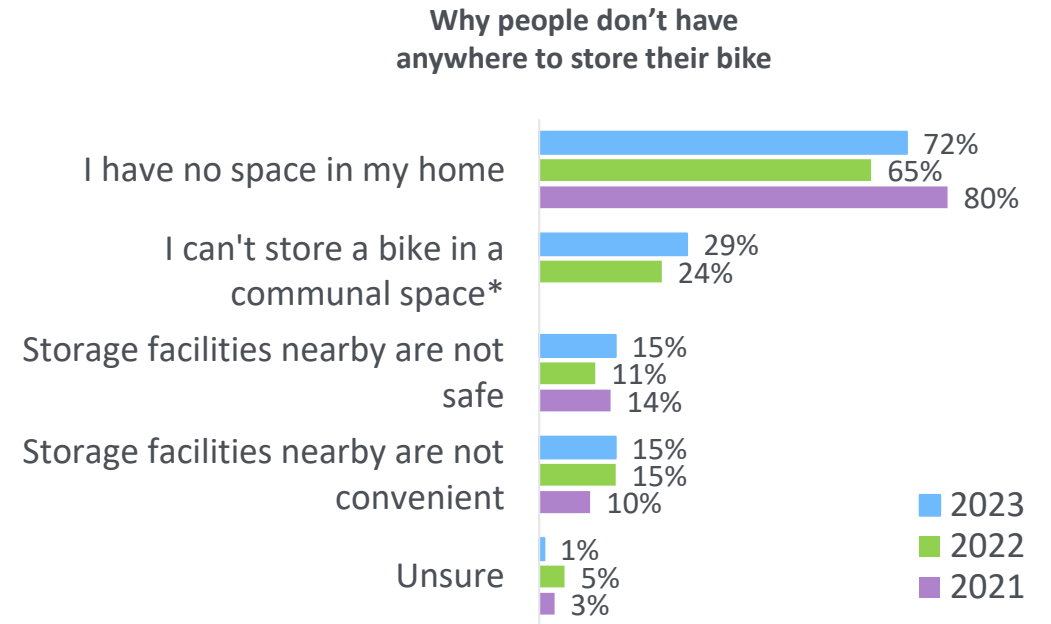
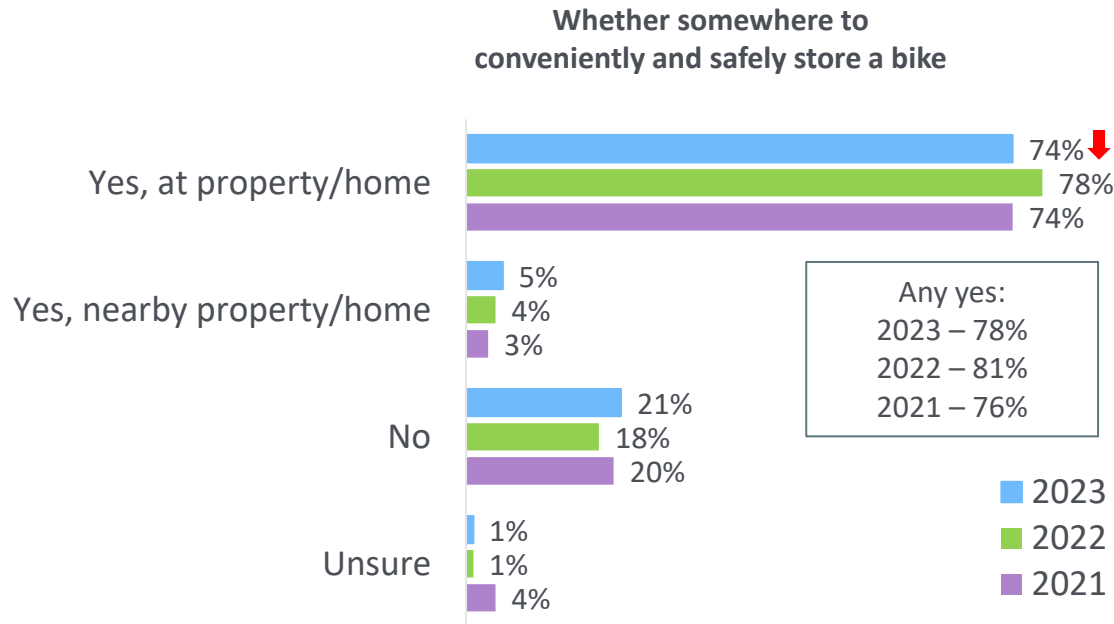




# Bike ownership: storing a bike



Around three quarters of people have somewhere to conveniently and safely store a bike at their property or home.



\*Added in 2022

- Since 2021, people have been asked whether they have anywhere convenient to store a bike where they live. Overall, 78% reported having somewhere they could store a bike, with most people having space at their property (74%) and a minority being able to store their bike nearby (5%).
- A lack of space in the home continued to be the main reason people don't have anywhere to store a bike in 2023 (72%).

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# Transport choices

# Transport choices

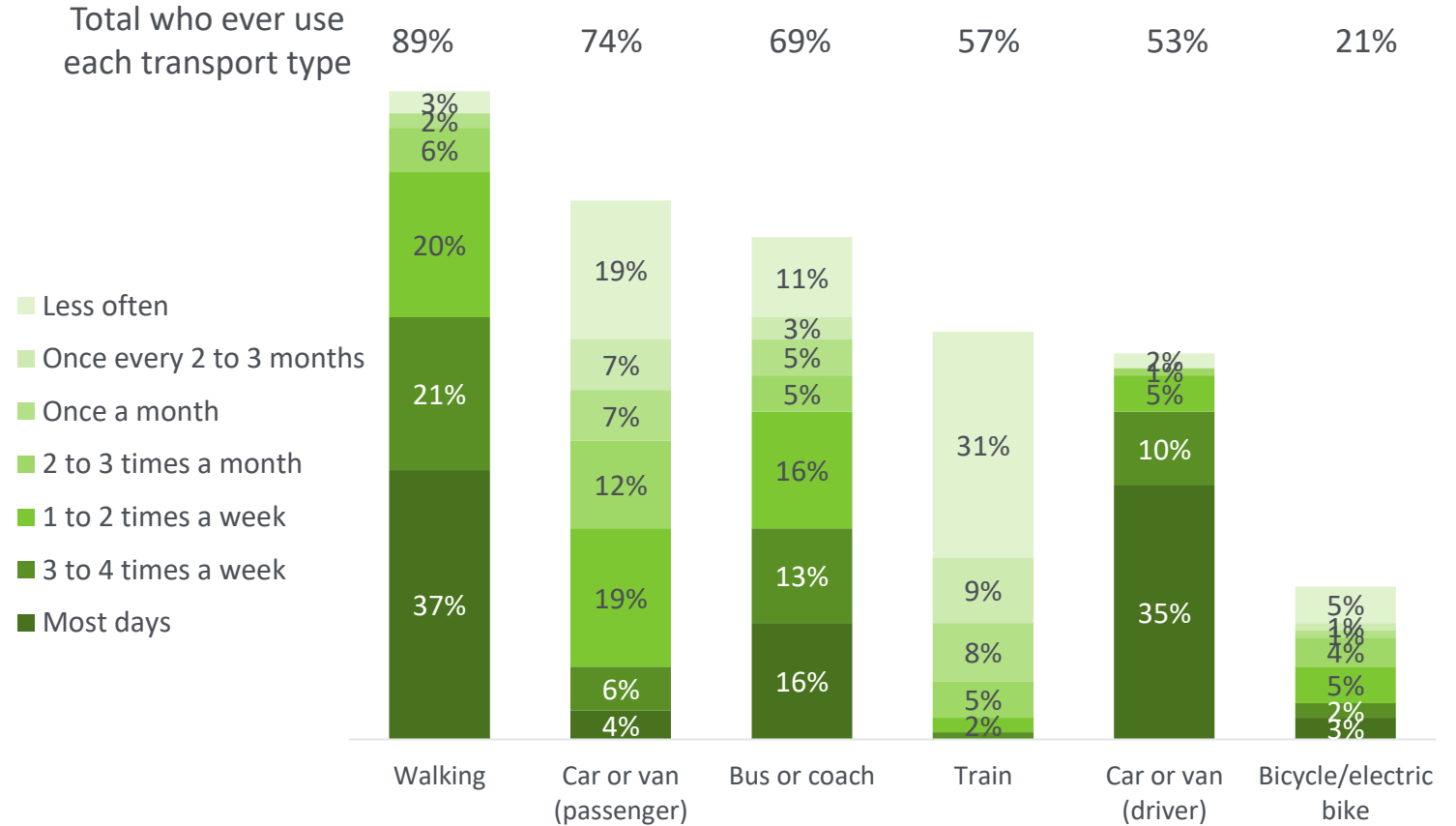
## Frequency

- In line with previous waves, driving and walking were the modes of transport used most frequently, with both used most days by more than a third of respondents (35% and 37%).
- A minority (11%) reported they never walk – larger proportions (upwards of 26%) never use the other modes of transport.\*
- Just over one fifth (21%) reported that they use a bike for journeys at least sometimes, with one in 10 (10%) cycling for some journeys at least once a week.
- As in previous waves, the following groups were more likely to cycle for journeys at least once a week:
  - men (15% vs. 5% of women)
  - 18-24 year olds (28% vs. 7% of 25+ year olds)

\*Data for walking may be higher than population as a whole as survey was conducted in-street and did not capture responses from housebound people.

**Q1: How often do you use the following modes of transport for journeys, such as going to work, to the shops, taking kids to school or going out socially at night?**

## Frequency of modes of transport for journeys



Base (all 2023): 1020

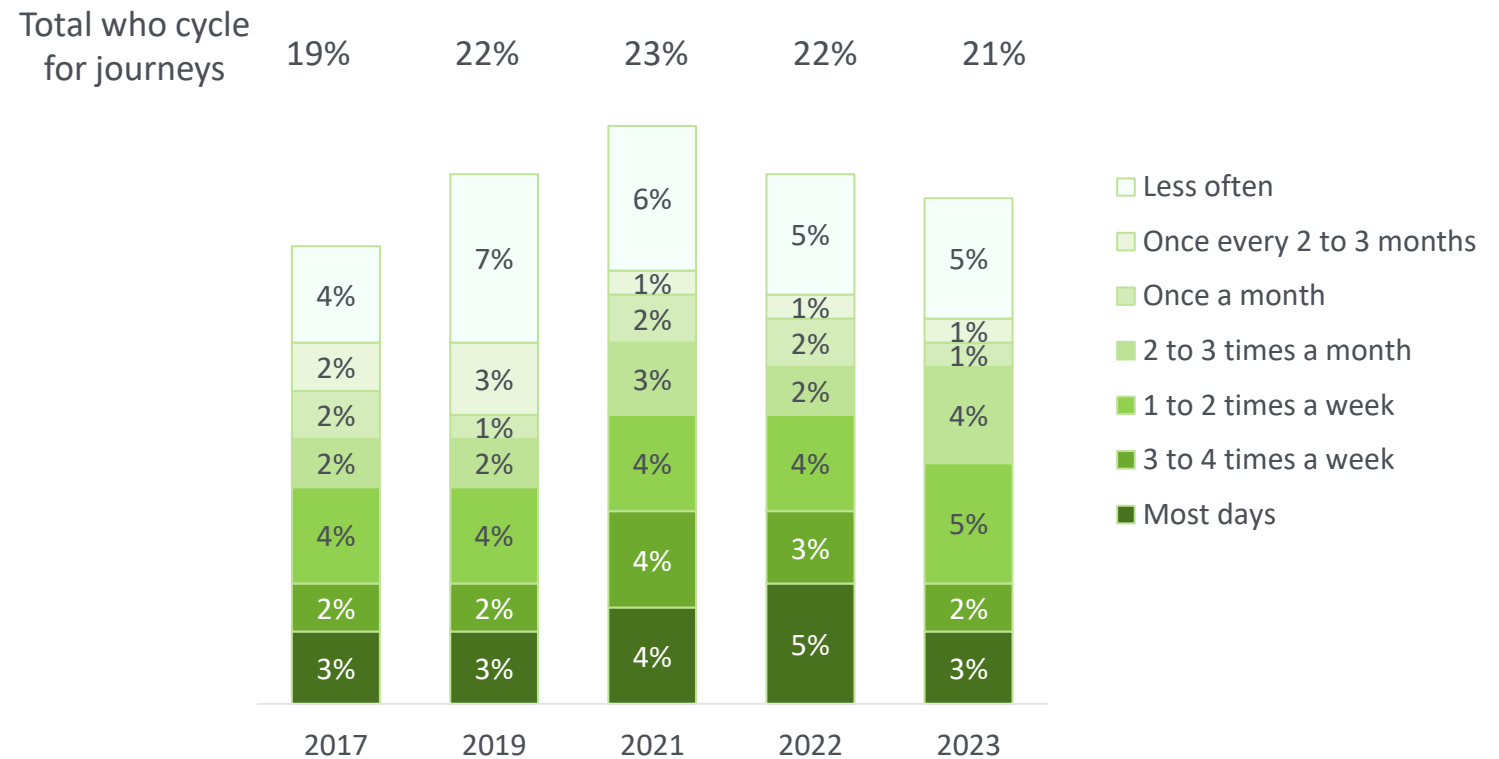
# Transport choices

## Frequency

- Looking over the recent waves of the tracking study, the proportion of people cycling for journeys has been relatively consistent; once again, the data shows around one in five people cycle for journeys (21%).
- Those cycling **at least once a week** has also remained consistent over the last few waves (12% in 2021, 12% in 2022 and 10% in 2023).

Q1: How often do you use the following modes of transport for journeys, such as going to work, to the shops, taking kids to school or going out socially at night?

## Frequency of cycling for journeys

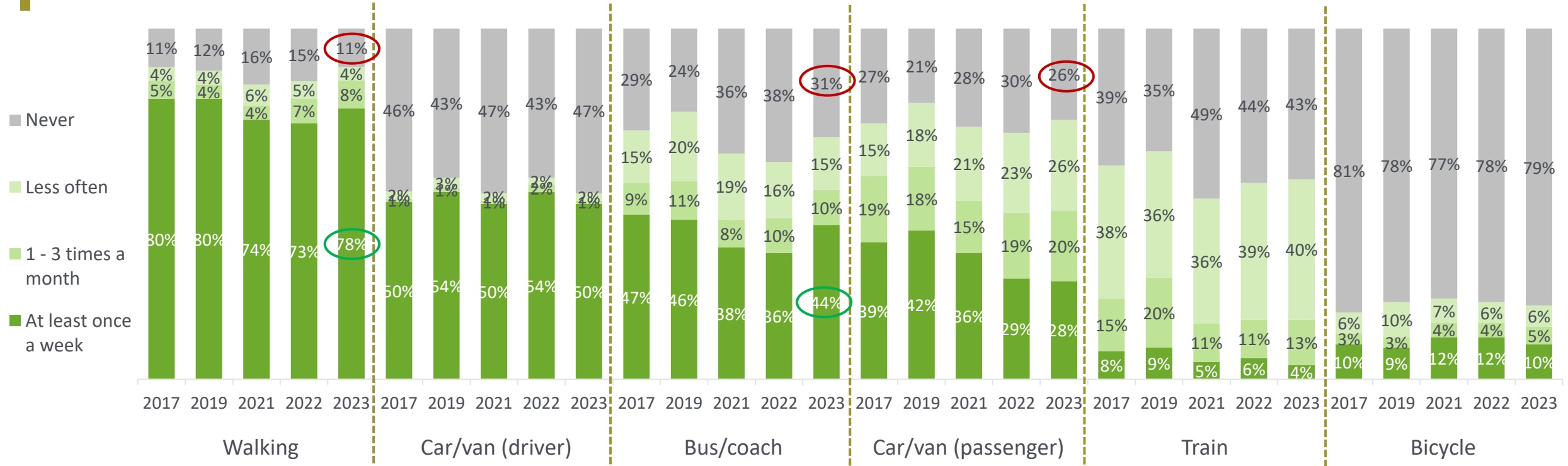


Base (all): 2017: 1060; 2019: 1049; 2021: 1029; 2022: 1037; 2023: 1020

# Transport choices



People were more likely to walk or travel via a bus or coach at least once a week, compared to the previous wave of results.



- Generally, frequency of usage of different forms of transport in 2023 were consistent with 2022 data. However, there has been an increase in people walking at least once a week, compared to 2022 (78% v 73% in 2022). Similarly, an increase can also be seen for people travelling on a bus or coach at least once a week (44% v 36% in 2022).
- The proportion who ever travel in a car/van as a passenger has increased in 2023 (from 70% in 2022 to 74%). Other modes of transport results have remained consistent over time.

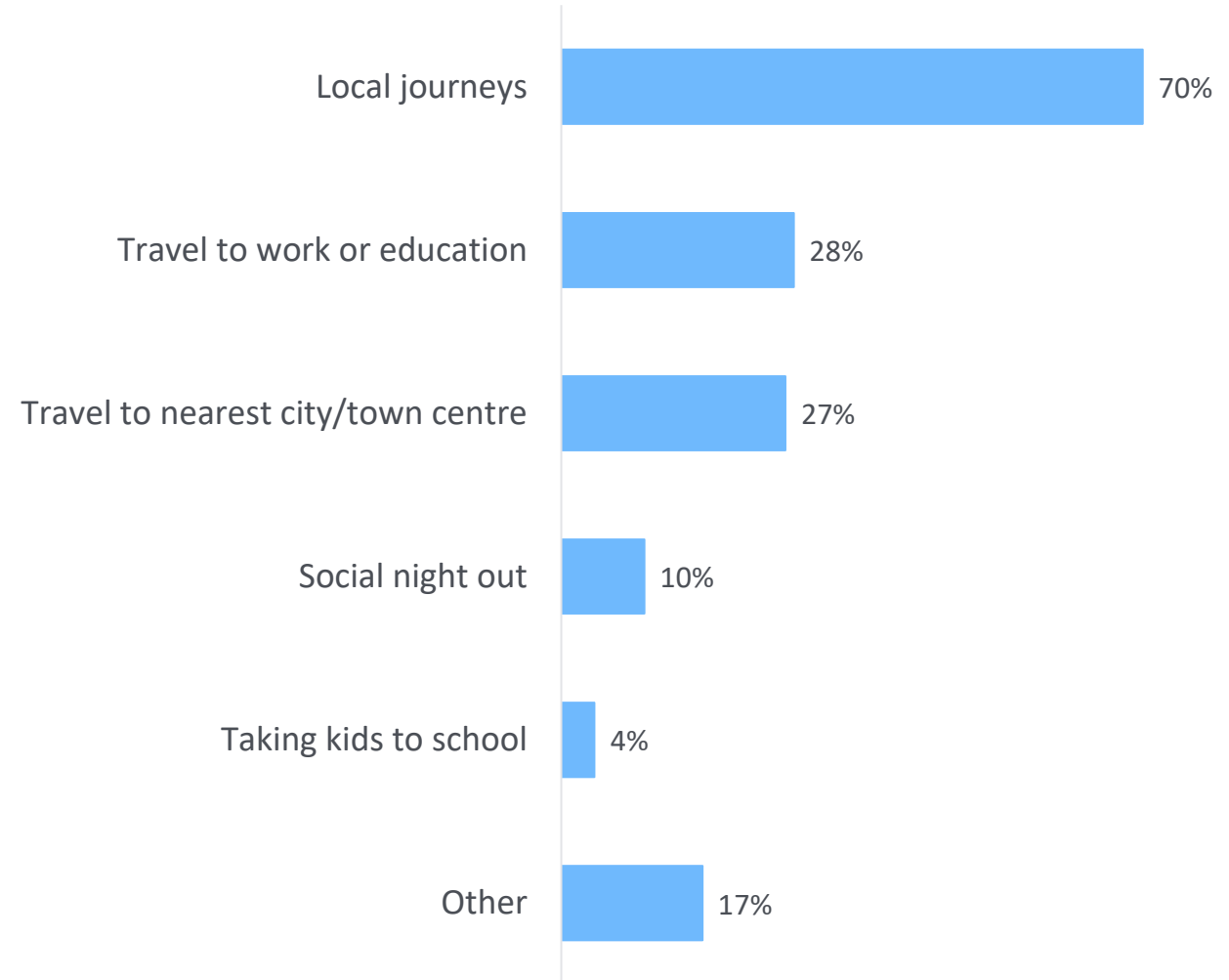
# Transport choices

## Journey types

- Consistent with recent waves, 15% of respondents reported they travel by bicycle at least once a month (compared with 16% in 2022, 17% in 2021, 12% in 2019 and 13% in 2017).
- Local journeys remains the main type of trip for people cycling, followed by commuting to work/education and travel to the nearest town/city centre.
- This wave has seen a significant decrease in those travelling by bike for local journeys (70% down from 83% in 2022), although the 2023 data is more consistent with data gathered in the years before this (75% in 2021, 76% in 2019, 70% in 2017).
- There has also been a decrease in the proportion of regular cyclists reporting travelling to work or education by bike (28% v 39% in 2022, 36% in 2021, 42% in 2019).
- The proportions travelling to the nearest city/town centre (27% v 30%), for a social night out (10% v 9%) and taking the kids to school (4% v 3%) were consistent with 2022.

Q3: For each of the means of travel you use, please tell me what types of journey you use it for?

## What types of journey do you use it for? – Bike/electric bike



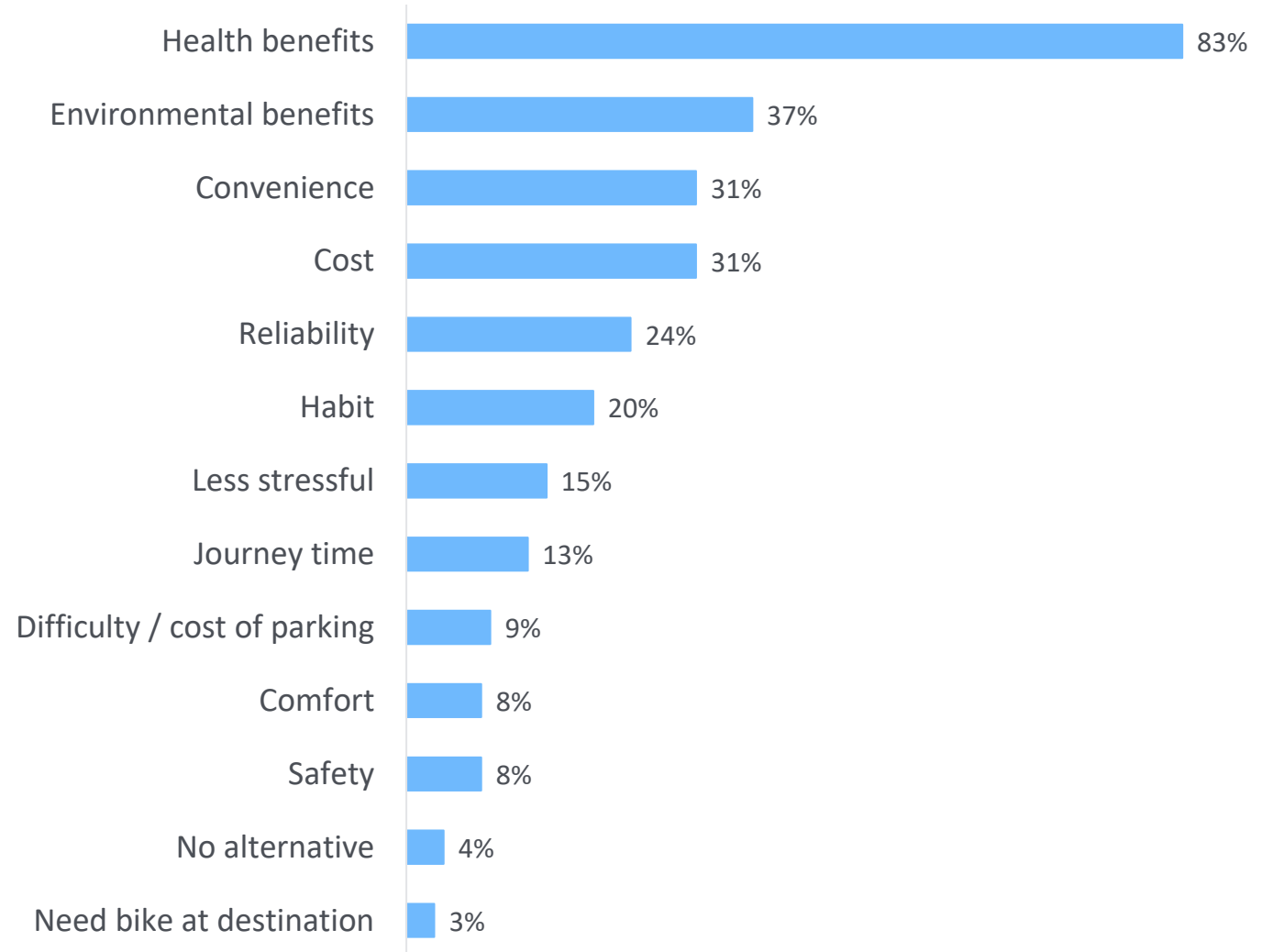
# Transport choices

## Reasons

- As with previous waves, a consistent picture has emerged in terms of motivations to cycle, with health benefits again being the main reason cited in 2023 (83%). This is an increase compared to 2022 (65%).
- There has been a steady increase in those citing environmental benefits over the waves of the research, with 37% citing this in 2023, compared to just 12% in 2017.
- Just less than a third cited convenience (31%) and cost (31%). These results are in line with 2022.

Q2: For each of the means of travel you use, please tell me why you travel this way?

## Why do you travel this way? – Bike/electric bike



Base (all bike/electric bike) 2023: 156

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# Cycling behaviours



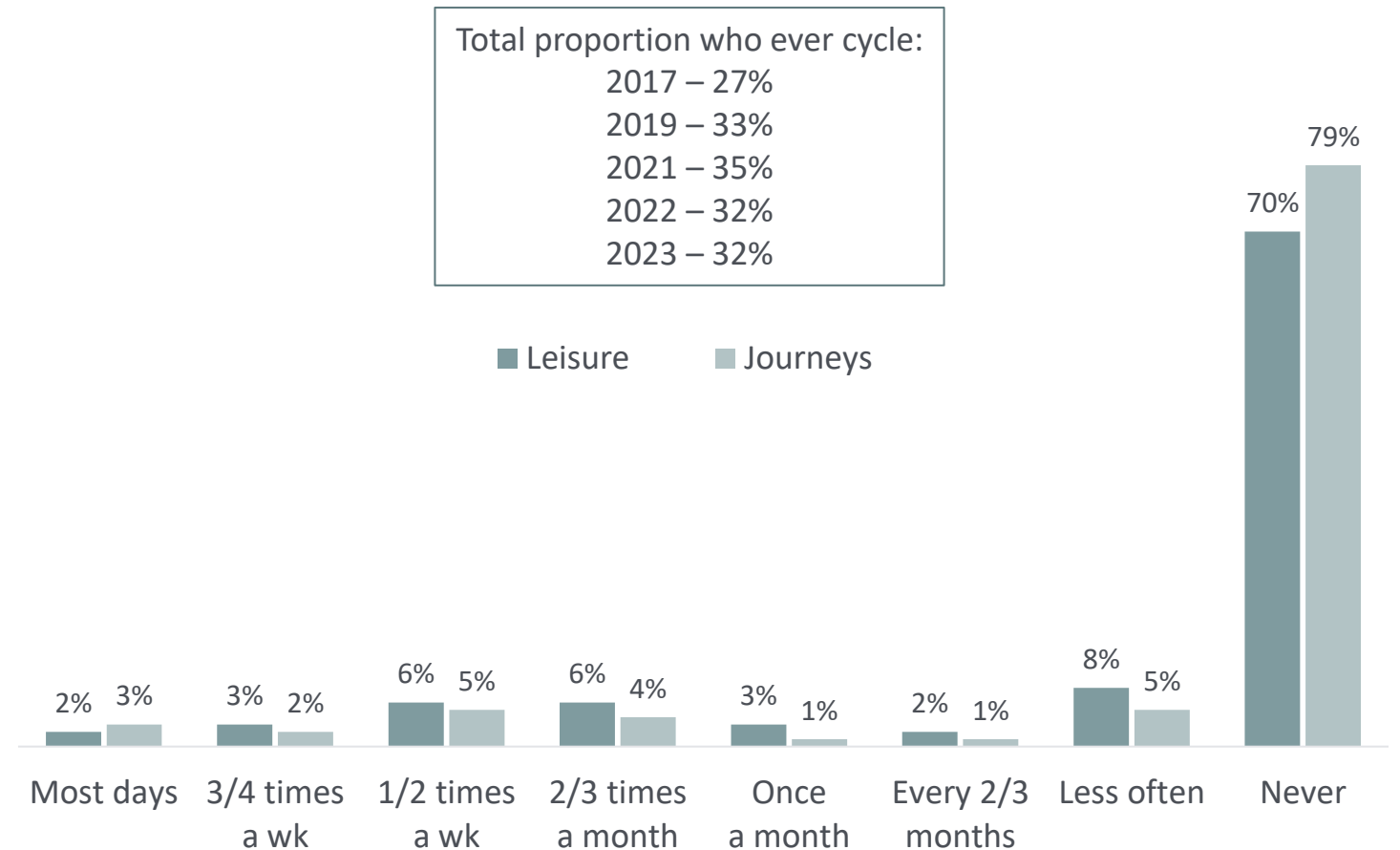
# Cycling behaviours

## Frequency

- Similar to findings in recent waves of the study, 30% of people cycle for leisure and 21% cycle for journeys.
- This equates to a third (32%) of the population cycling for either leisure or regular journeys, matching the figure from 2022.
- People who ever cycle are most likely to be:
  - Men (42%, compared with 21% women)
  - Under 35 years old (48%, compared with 17% 55+)
  - ABC1 (37%, compared with 25% C2DEs)
- These characteristics have remained consistent over time.



In 2023, one third of people cycle – mirroring previous waves’ results



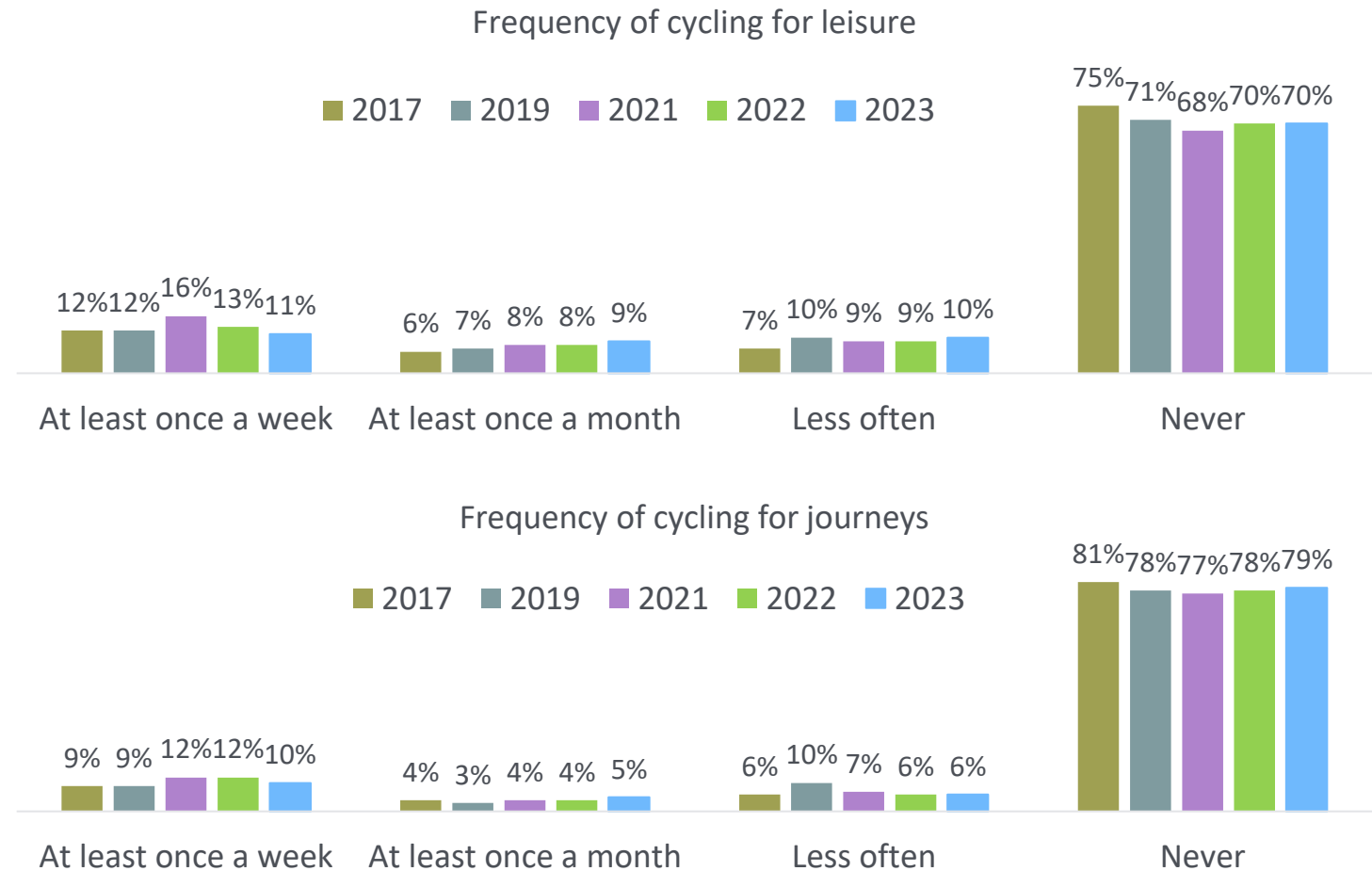
# Cycling behaviours

## Frequency

- Over the course of the five waves of research, people are more likely to use a bicycle for leisure than for journeys (30% for leisure and 21% for journeys).
- The frequency of cycling for both leisure and journeys has also remained broadly consistent over time - around one in ten cycle weekly for each purpose.
- The proportion of people who **never** cycle (68%), either for leisure or for journeys, has been consistent for the last four waves of the tracker, but is lower than when the study began in 2017 (73%).



In 2023, the frequency of cycling for leisure/journeys was consistent with previous waves



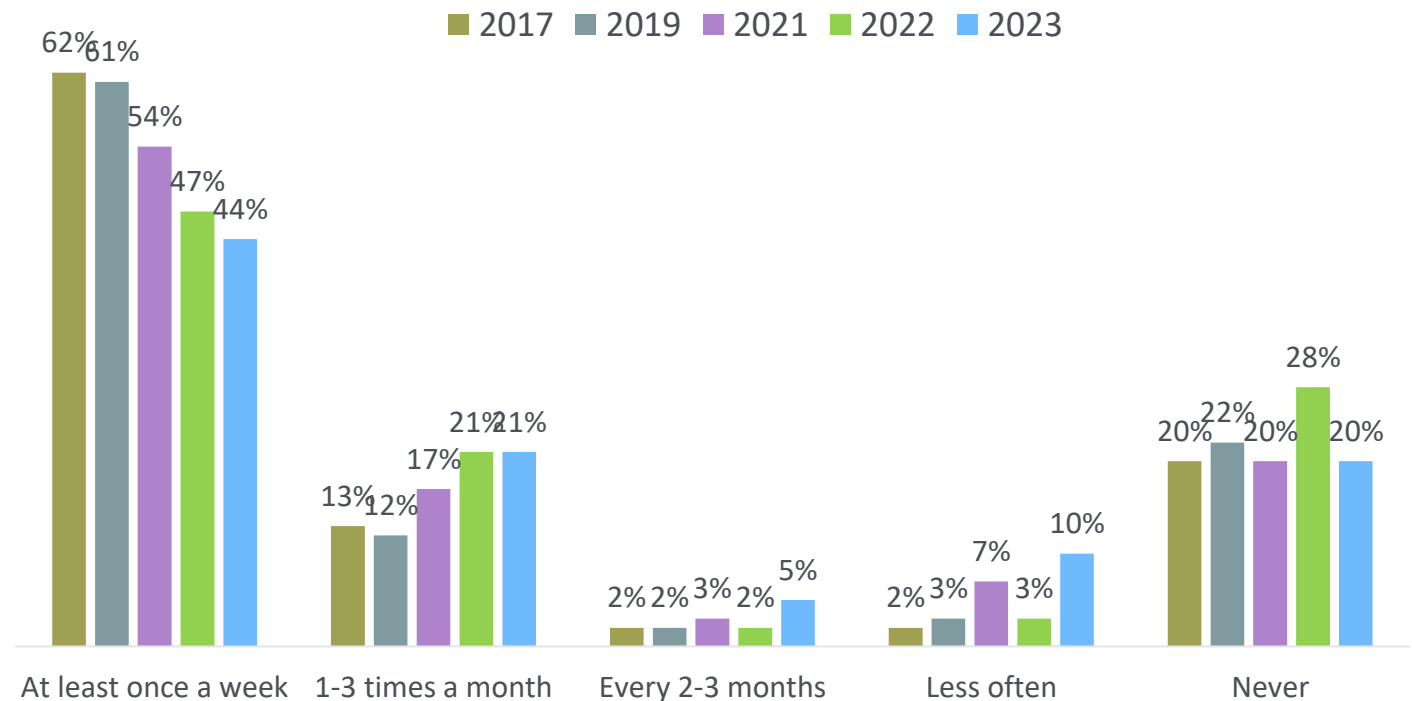
# Cycling behaviours


## Frequency of child cycling

- As we have seen in previous years, a higher proportion of children aged 6 to 15 years old cycle (80%), compared to the adult population.
- The spike in the proportion of children that **never** cycle in 2022 (28%) realigned with earlier waves in 2023 (20%).
- Children were most likely to cycle at least once a week (44%), with fewer reporting at 1 to 3 times a month (21%) or less often than this (15%). However, there has been a steady decline in weekly cycling since the tracker began in 2017 (62%).
- Additionally, we asked all people with children aged 11 or older whether their children had received Bikeability training at school – 64% reported they had, 23% had not, and 13% were unsure.

Q15: How often does your child tend to cycle, either for fun or for getting to school, friends' houses, etc.? Q16: Has your child/children aged 11 or older ever received any cycle training at school? This may have been called Bikeability training.

Four-fifths parents reported their child cycles - consistent with previous waves, but steady decline in weekly cycling



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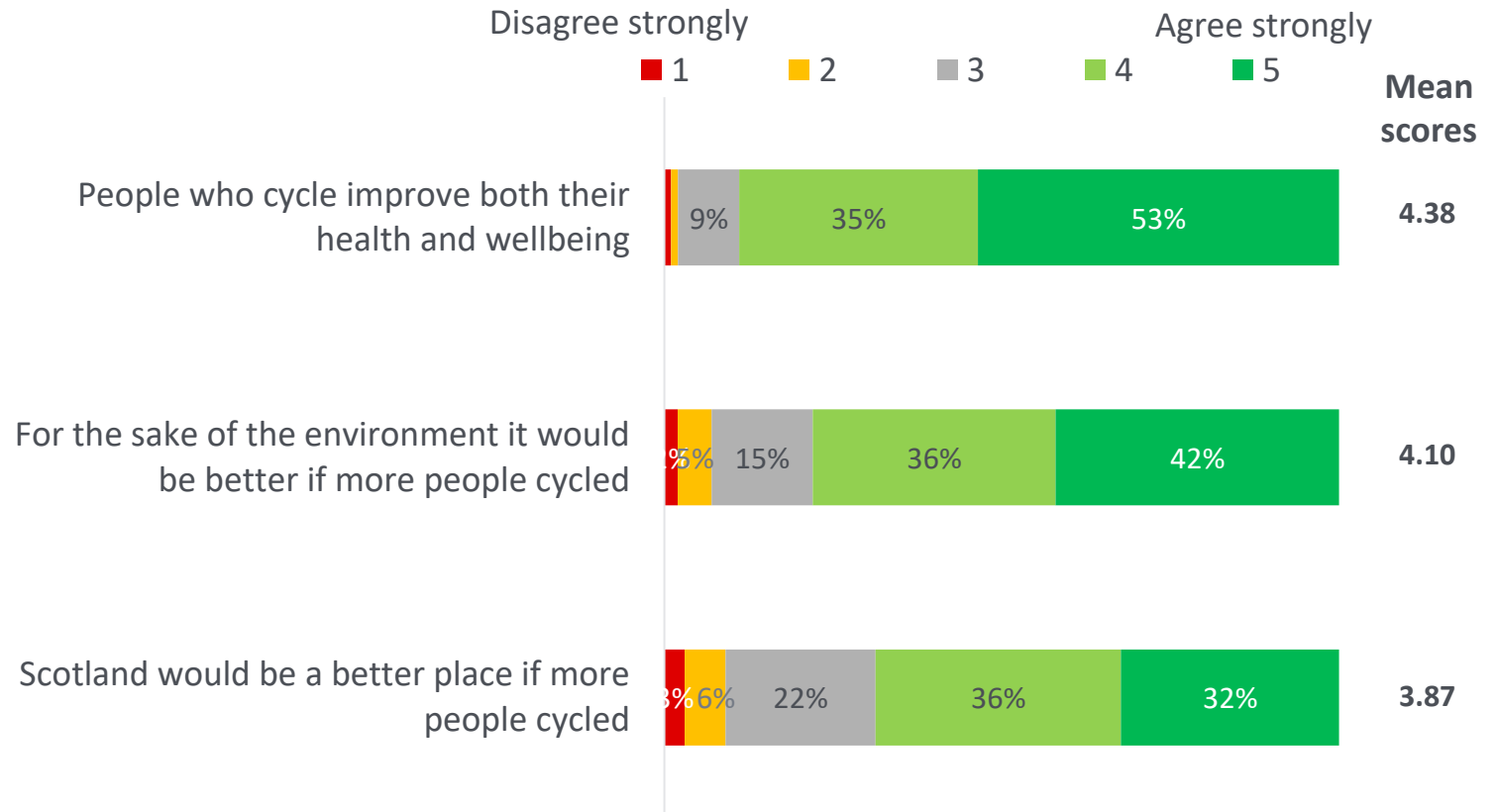
# Attitudes to cycling

# Attitudes to cycling

- Overall, people's attitudes towards cycling remain very positive:
  - 88% agreed that people who cycle improve both their health and their wellbeing (91% in 2022).
  - 78% agreed that, for the sake of the environment, it would be better if more people cycled (80% in 2022).
  - 68% agreed that Scotland would be a better place if more people cycled (68% in 2022).
- But as before, people are more likely agree that cycling is better for the individual than it is for society, and opinions were split between those agreeing (scoring 4) and agreeing strongly (scoring 5).

Q4: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Most respondents agree that cycling will improve their health and wellbeing, the environment and society as a whole

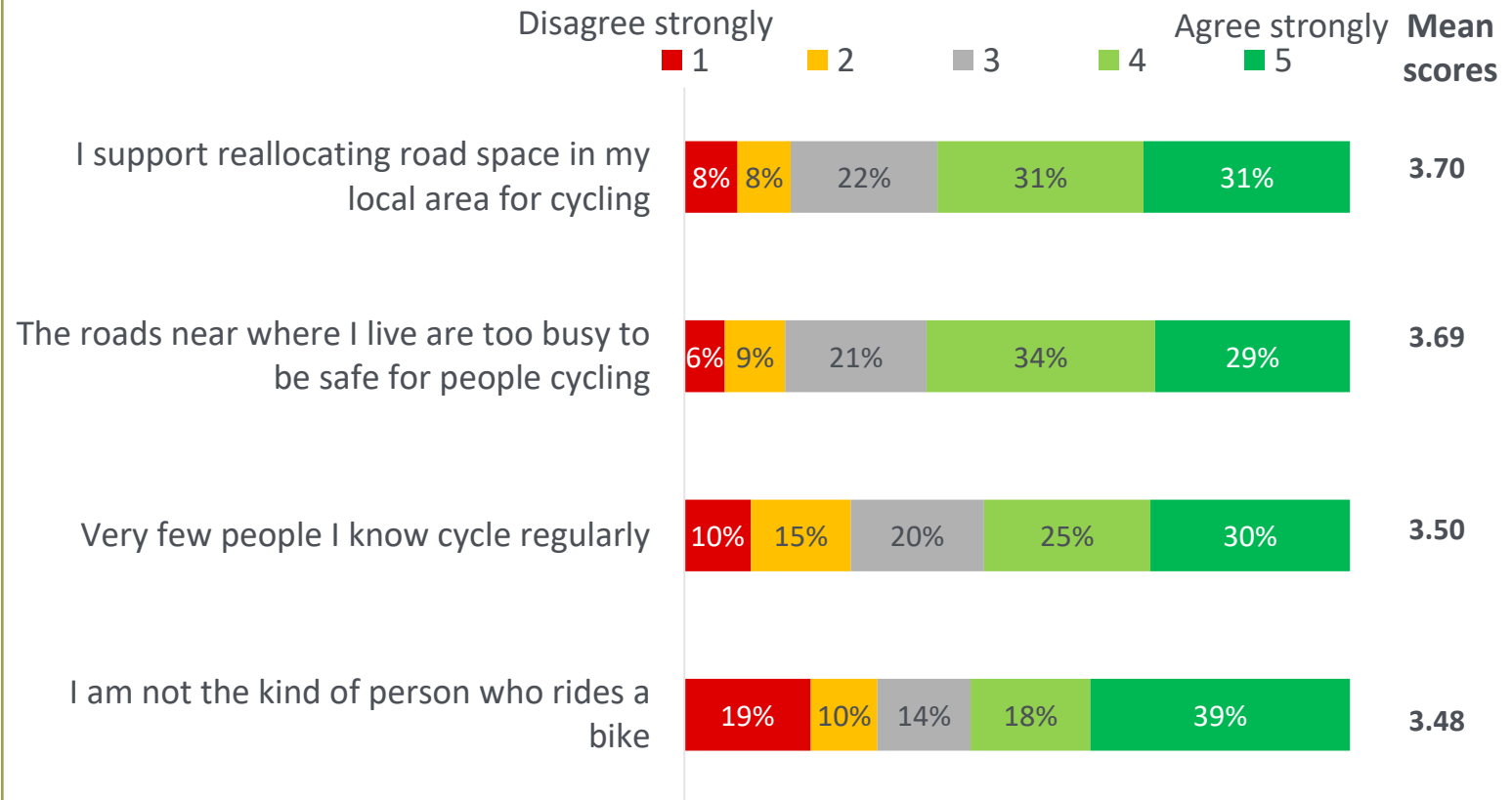


Base (all): 1020

# Attitudes to cycling

- With nearly two thirds (63%) agreeing that local roads are too busy for cycling, it is encouraging to note that a similar proportion (62%) agreed that they would support reallocating road space in their local area for cycling (which would be a way of addressing this barrier).
- Similar proportions agreed that they know very few people that cycle regularly (55%) as agreed they are not the kind of person who rides a bike (57%, an increase from 52% in 2022). Personal association with cycling therefore remains a prominent barrier for people to overcome.

There are barriers to cycling, most notably busy roads, but there is support for increasing local road space for cycling



Q4: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

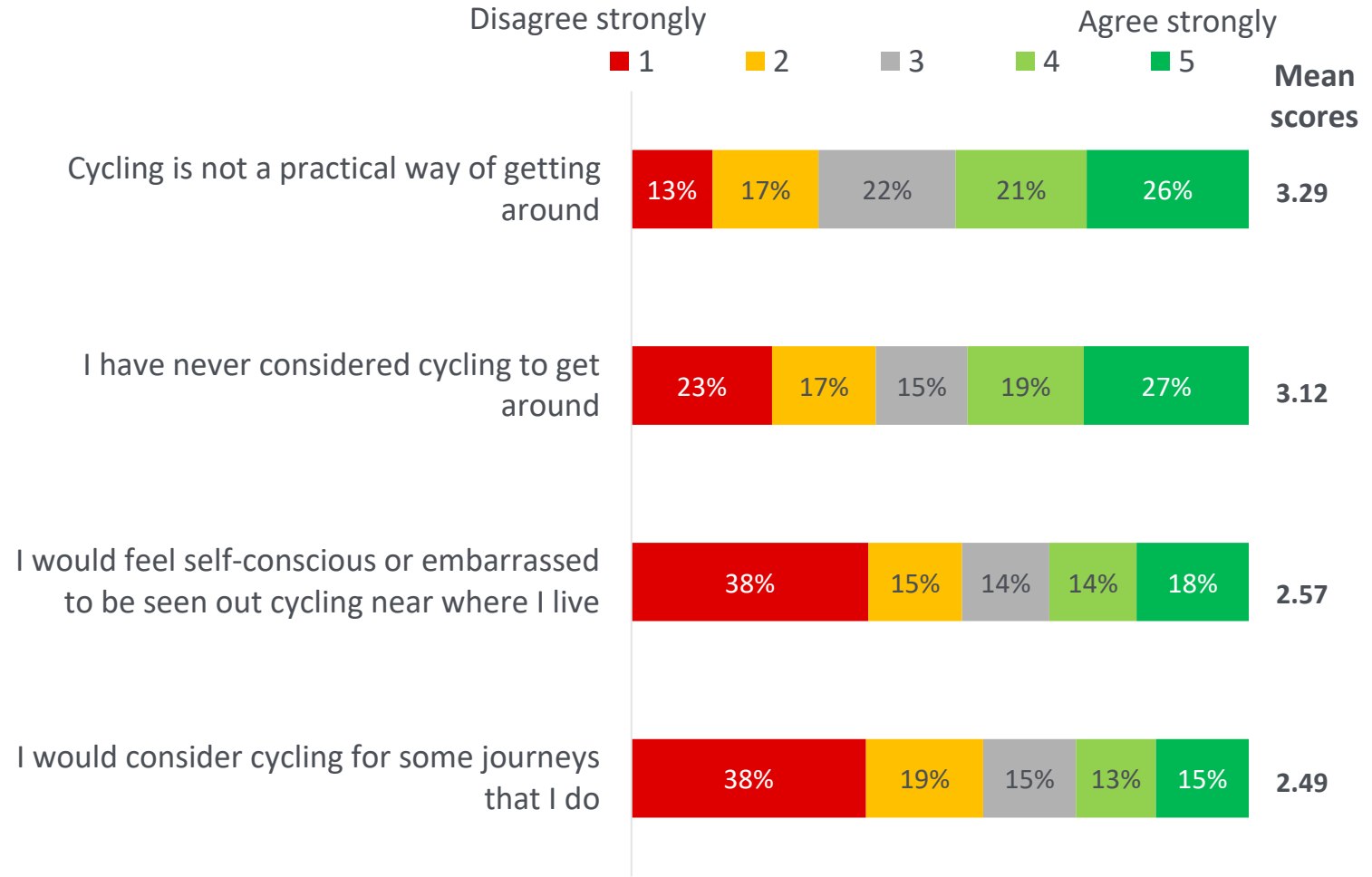
Base (all): 1020

# Attitudes to cycling

- The low level of agreement with these statements reinforces earlier findings that many people would not consider cycling as a means of transport.
- Nearly half (47%) agreed that cycling is not a practical way to get around, with a similar proportion (46%) agreeing they have never considered cycling.
- Although more disagreed (54%), almost a third of respondents (32%) agreed that they would feel self-conscious cycling, suggesting this is a barrier to a significant minority.
- Almost three in ten (28%) agreed that they would consider cycling for some journeys, which is higher than the proportion currently doing this (21%), suggesting scope to increase cycling for journeys among the population.

Q4: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Few consider cycling as a transport option, often due to the practicalities

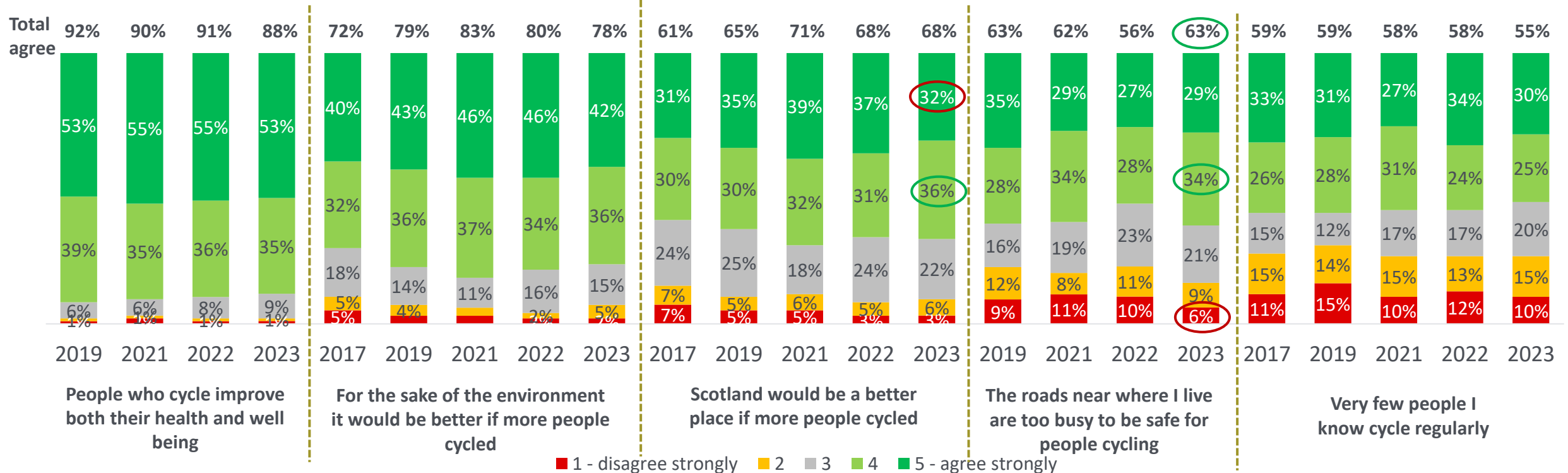


Base (all): 1020

# Attitudes to cycling



Positive attitudes have been consistently high over the waves of the tracking study, but there was an increase in those concerned with roads being too busy this year



- Results have remained broadly consistent with regards to people agreeing that cycling improves health and wellbeing, is good for the environment and makes Scotland a better place, with high levels of agreement across the waves.
- There was an increase in those agreeing that their local roads are too busy to be safe for cycling, compared to 2022 (63% v 56%), although scores in 2023 are now back in line with 2019 and 2021 agreement levels.
- The proportion feeling that they know few people who cycle has remained broadly unchanged since the start of the tracking study.

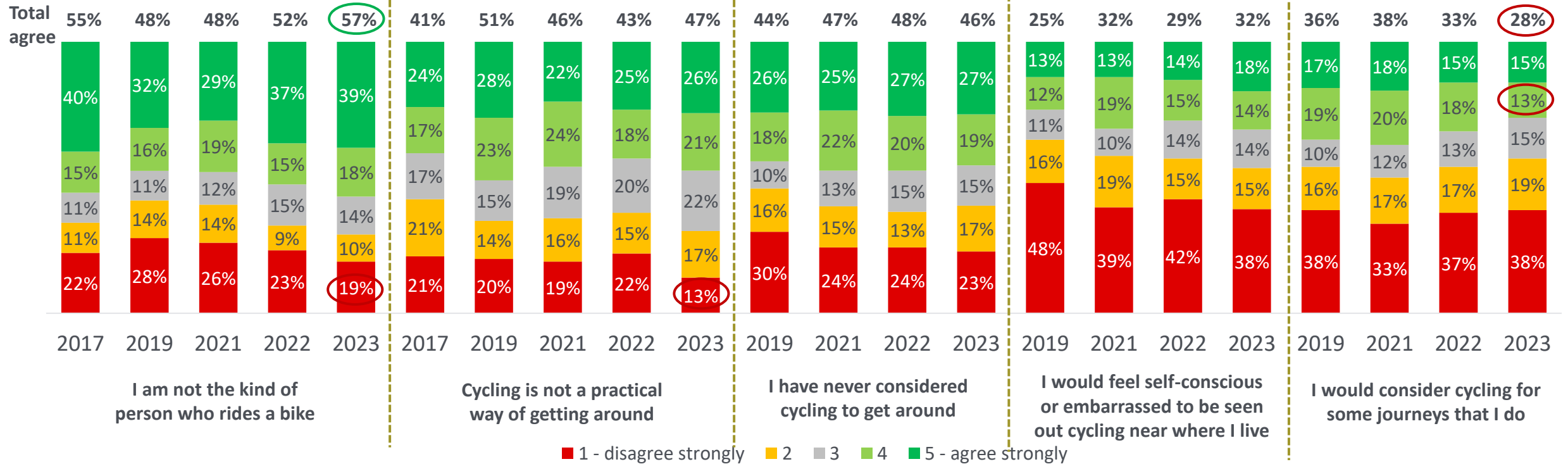
Q4: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.



# Attitudes to cycling



The proportion agreeing that they would consider cycling for some journeys that they do was at its lowest this wave



- Over half of respondents do not consider themselves to be the kind of person who cycles, which is an increase in this attitude compared to recent waves of the study.
- In 2023 there was also a decrease in the proportion agreeing that they would consider cycling for journeys compared to previous waves – almost 3 in ten would consider cycling for journeys.
- Other negative attitudes, such as cycling not being practical, having never considered cycling and feeling self-conscious cycling, have been relatively consistent over the waves of the tracking study.

Q4: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

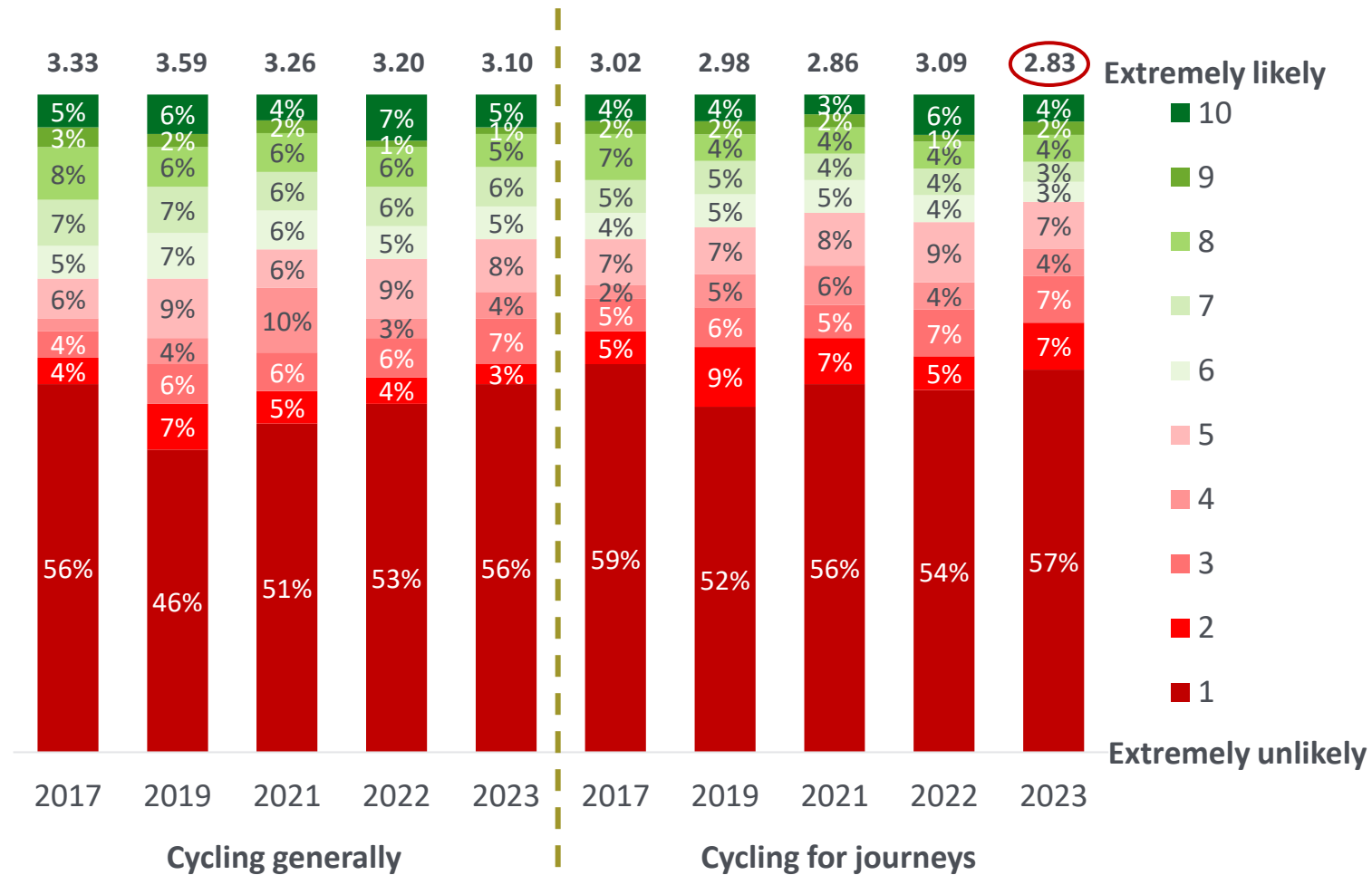
Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037, 2023: 1020

# Attitudes to cycling

## Propensity to increase cycling

- The proportion of people who are likely (i.e., gave a score of 6-10) to increase the amount of cycling they do generally has remained consistent since 2021 (22% in 2023, 24% in 2022, 23% in 2021).
- The proportion of those likely to increase the amount of cycling for journeys has also remained stable (17%, compared to 20% in 2022 and 18% in 2021), although the overall average score is lower than in 2022.
- Over half of people rejected cycling in the future (scoring 1 out of 10) – either generally or for journeys – which is also broadly consistent across the waves of research.

Overall likelihood to increase cycling is relatively consistent, although average score for journeys lower than in 2022



Q7/8: On a scale of 1 to 10, where 1 is extremely unlikely and 10 is extremely likely, how likely are you to:

- increase the amount of cycling you do generally in the next 2-3 years?
- increase the amount of cycling you do for journeys next 2-3 years?

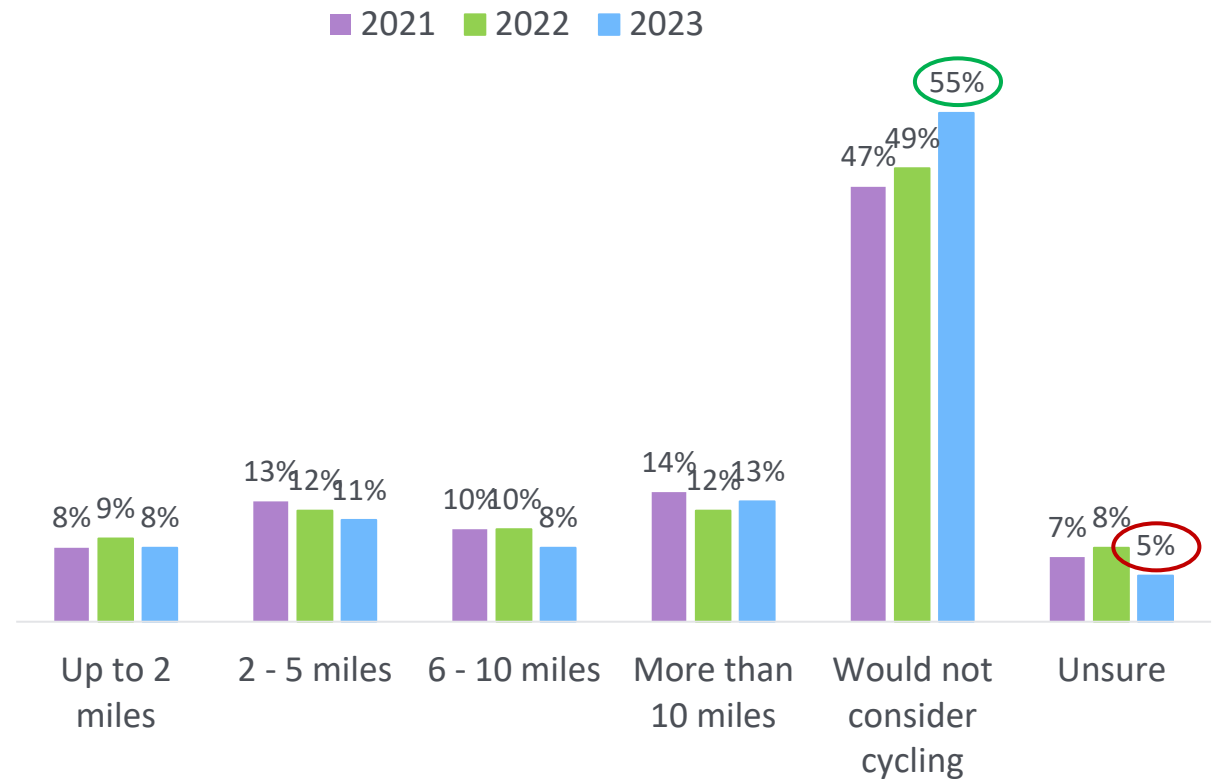
# Attitudes to cycling

## Distance willing to cycle

- The total proportion of people who would consider cycling has fallen slightly since 2021 (40% in 2023; 43% in 2022; 45% in 2021).
- Just over one quarter (27%) are willing to cycle a distance of less than 10 miles, with around one in eight (13%) willing to cycle more than 10 miles, which is also consistent with previous waves.
- More women than men would not consider cycling at all (62% v 47% men). Similarly those aged 55+ were less likely to consider cycling (75% v 35% of those aged 18-34).

Q6: What is the furthest distance you would consider cycling in a single trip?

Around one in eight people would consider cycling more than 10 miles



Question added in 2021

Base (all) 2021: 1209, 2022: 1037, 2023: 1020

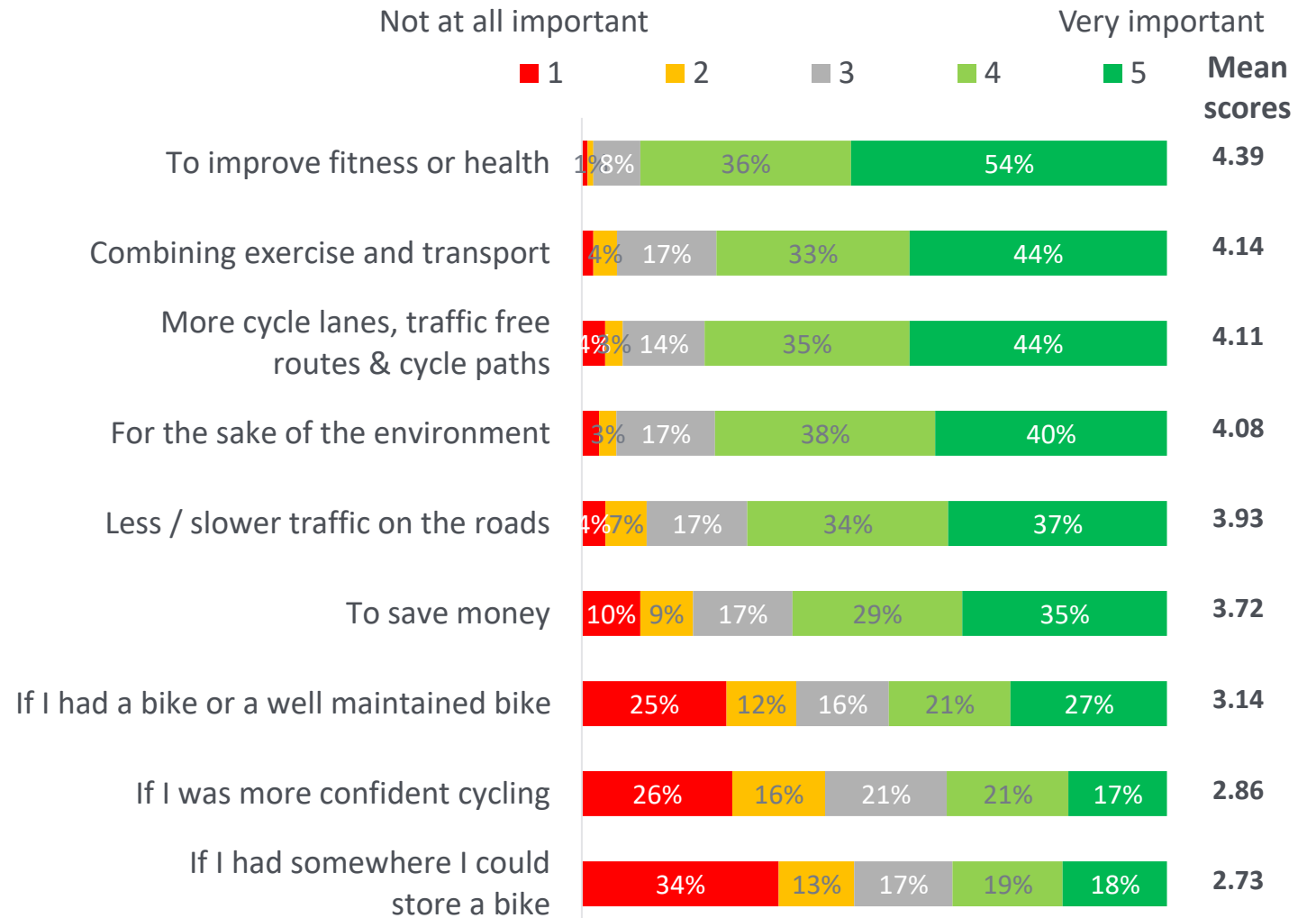
# Attitudes to cycling

## Motivations to cycle

- Those who scored 3 or more out of 10 for propensity to cycle were asked how important each of the listed factors would be in encouraging them to cycle more for journeys.
- In line with previous data, the motivating factor with the highest importance rating was to improve fitness or health (89% in 2023, 90% in 2022).
- Combining exercise and transport (78%) and more cycle lanes, traffic free routes and cycle paths (79%) were also considered important motivators to a majority of people.
- Respondents also regarded environmental considerations (77%) and less/slower traffic (71%) to be important factors that would encourage them to cycle more.



## Health and fitness factors combined with transportation were most important motivators



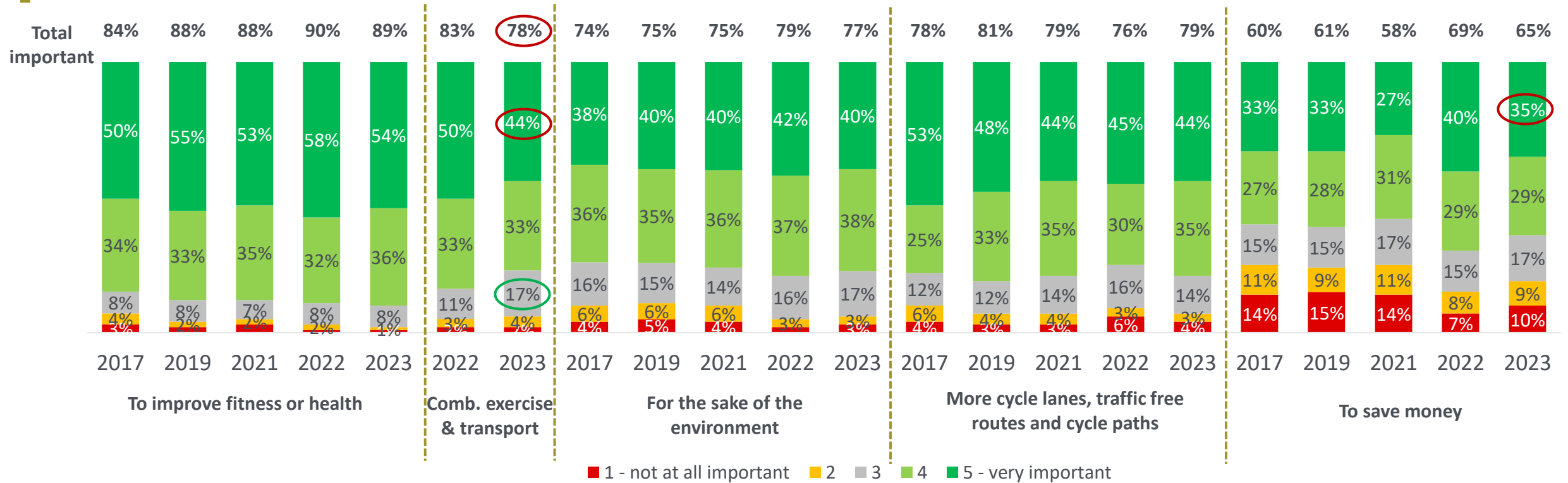
Base (all who score 3 or more for propensity to cycle – Q7/Q8): 424

Q9: I am going to read out a list of factors that some people have said would encourage them to cycle for journeys. For each factor, please tell me how important each statement is or would be to you in encouraging you to cycle more often for journeys.

# Attitudes to cycling



The importance of the top-most motivating factors was broadly consistent with results in previous waves

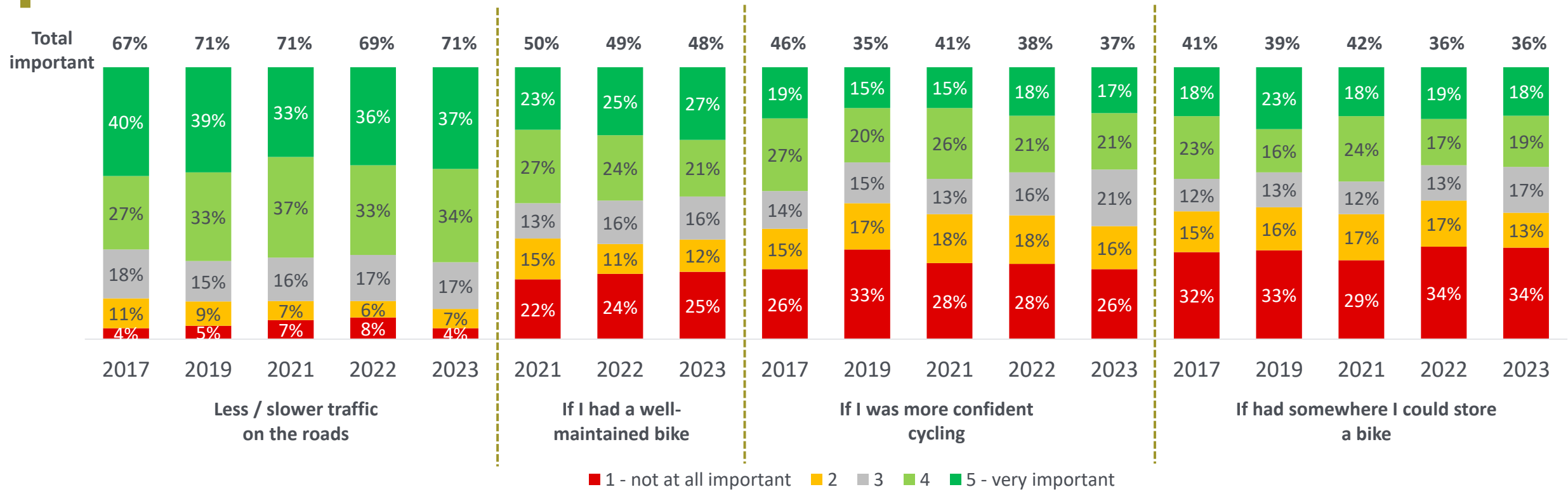


- Following a peak in 2022, some of the top motivating factors decreased slightly in 2023, although year-on-year differences are not statistically significant.
- There was, however, a decrease in the proportion rating ‘combining exercise and transport’ as important; and a decrease in the proportion rating ‘to save money’ as very important after a high in 2022.

# Attitudes to cycling



Similarly, the importance of the less motivating factors remained consistent



- In terms of encouraging them to cycle more often for journeys, respondents considered having less traffic on the roads, having a well-maintained bike, being more confident cycling, and having somewhere to store a bike as important as they did in previous waves.
- The importance of confidence cycling has fallen over time, from 46% in 2017 to 37% in 2023, suggesting confidence on a bike is less of a barrier to cycling.

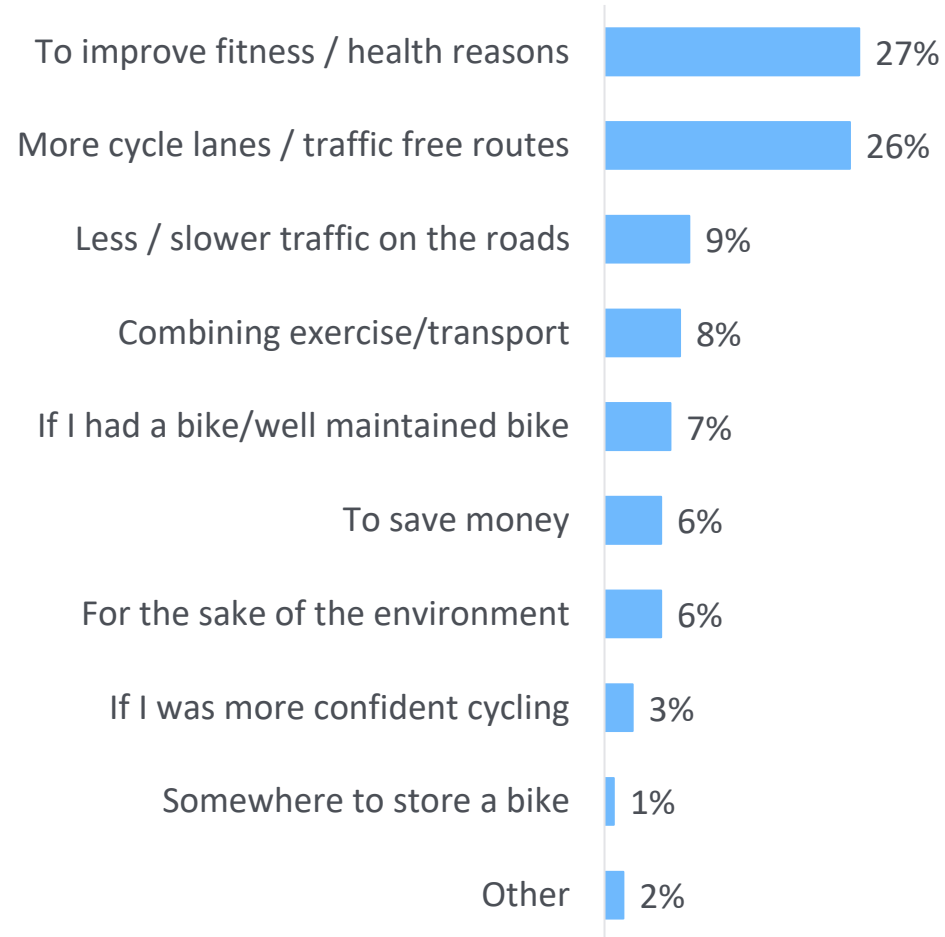
# Attitudes to cycling

## Key motivation to cycle

- When asked to select just one thing that would encourage them to cycle more for journeys, respondents most frequently chose improving fitness (27%) and more cycle lanes (26%).
- Less common factors included less traffic on the roads (9%), combining exercise and transport (8%), and having a bike/a well-maintained bike (7%).
- These findings were generally consistent with previous waves; however, since 2022, there has been a significant increase in those selecting more cycle lanes (26% v 17% in 2022) and having a bike/a well-maintained bike (7% v 2% in 2022) and fewer people selecting to save money (6% v 20% in 2022).

Q10: What would be the one main factor that would encourage you to cycle or cycle more often for journeys?

The key motivating factors for cycling are for improved health and if there were more dedicated cycle lanes/paths

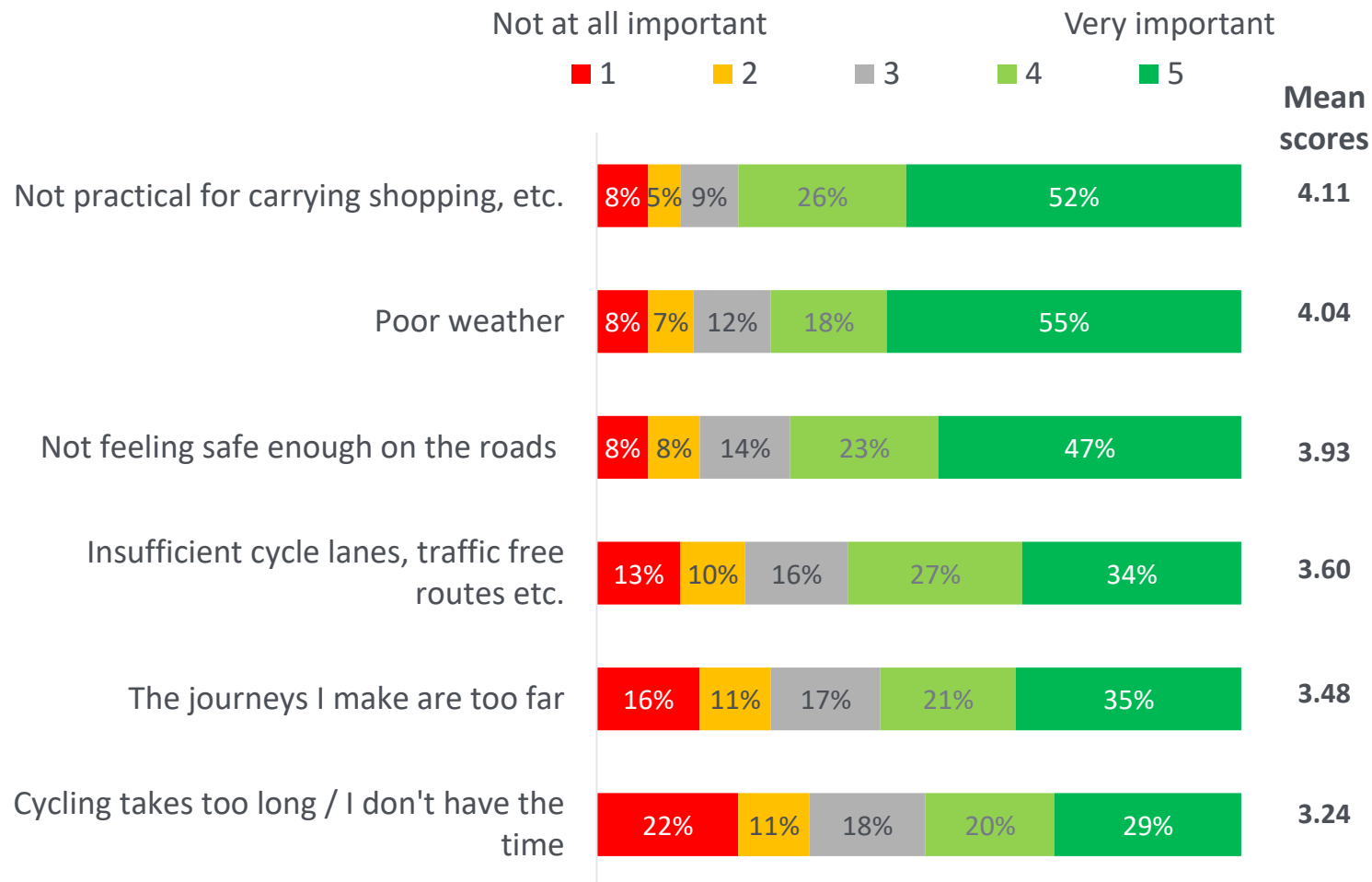


# Attitudes to cycling

## Barriers to cycling

- All respondents were asked to rate the importance of factors in preventing them from cycling more for journeys.
- The findings were consistent with previous waves, with concerns around both practicality and safety prominent.
- Not feeling safe enough on the roads (70%) and insufficient cycle lanes (62%), two interconnected factors, were considered important barriers by large proportions of people. Unlike poor weather and practicality issues (shopping, children etc.), these are factors that can be influenced by campaigners and policymakers.

Similar to previous waves, practicalities, poor weather, and safety on the roads were the most prominent barriers



Base (all): 1020

Q11: I am going to read out a list of factors that some people have said puts them off or prevents them from cycling for journeys. For each factor, please tell me how important it is to you in preventing you from cycling more for journeys.

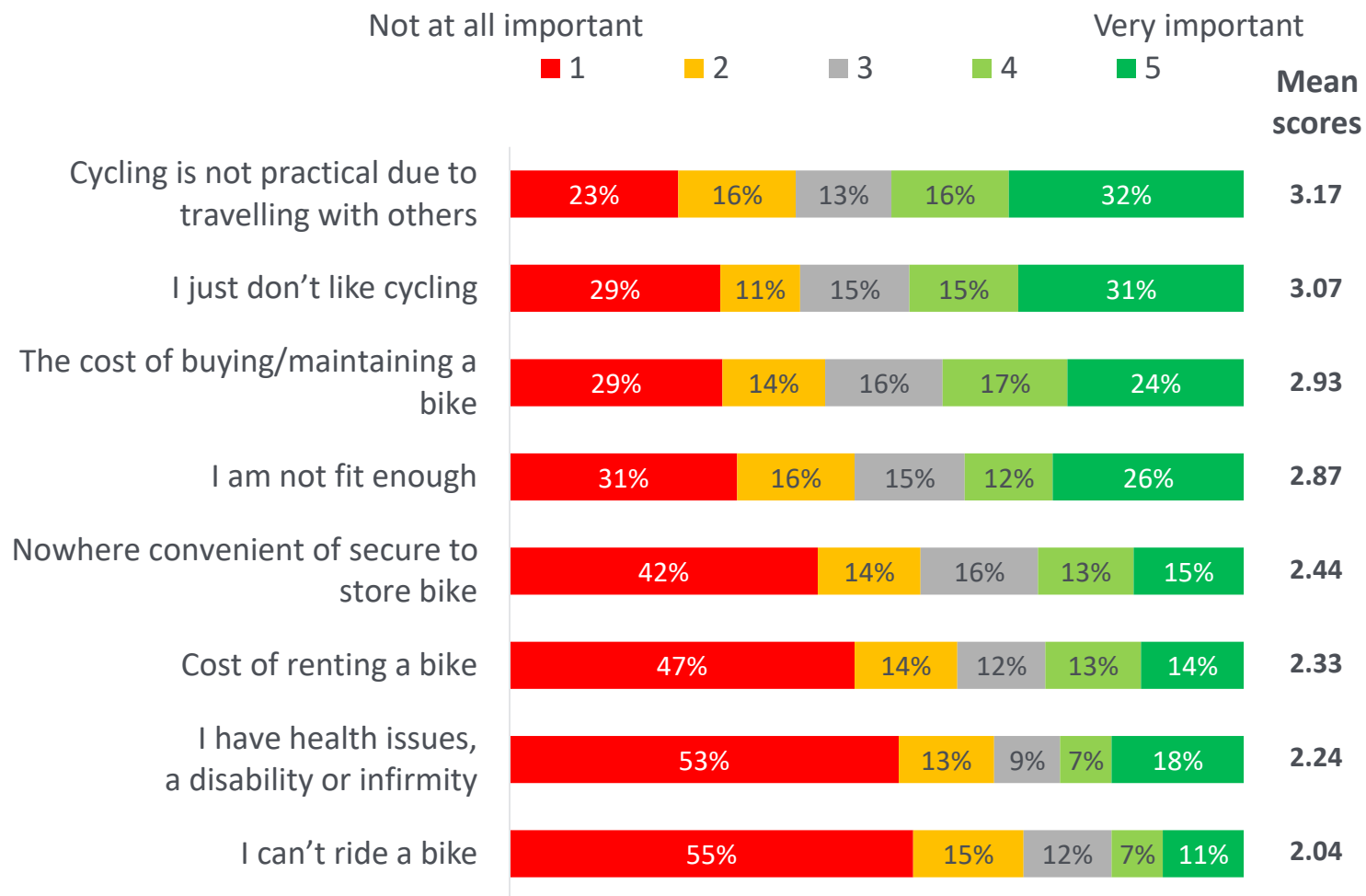


# Attitudes to cycling

## Barriers to cycling

- As with previous waves, personal reasons for not cycling (like cost of buying or renting a bike, a lack of fitness etc.) were less likely to be rated as important.
- Factors with lower importance included cycling not being practical due to travelling with others (47% important), not liking cycling (45%), the cost of buying/maintaining a bike (41%), and not being fit enough (39%).
- In 2023, there were increases in those citing importance of not liking cycling (45% v 38% in 2022), not being fit enough (39% v 34% in 2022) and the cost of buying/maintaining a bike (41% v 35%).

Factors including storing, renting and ability to ride a bike were deemed less important barriers to cycling

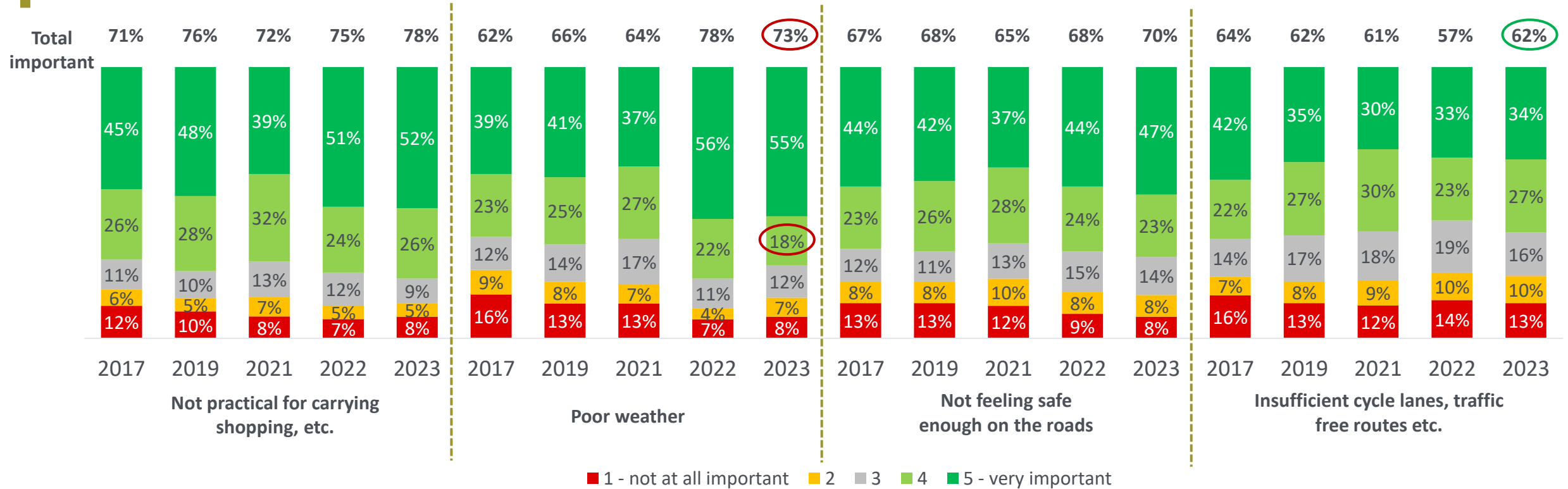


Q11: I am going to read out a list of factors that some people have said puts them off or prevents them from cycling for journeys. For each factor, please tell me how important it is to you in preventing you from cycling more for journeys.

# Attitudes to cycling



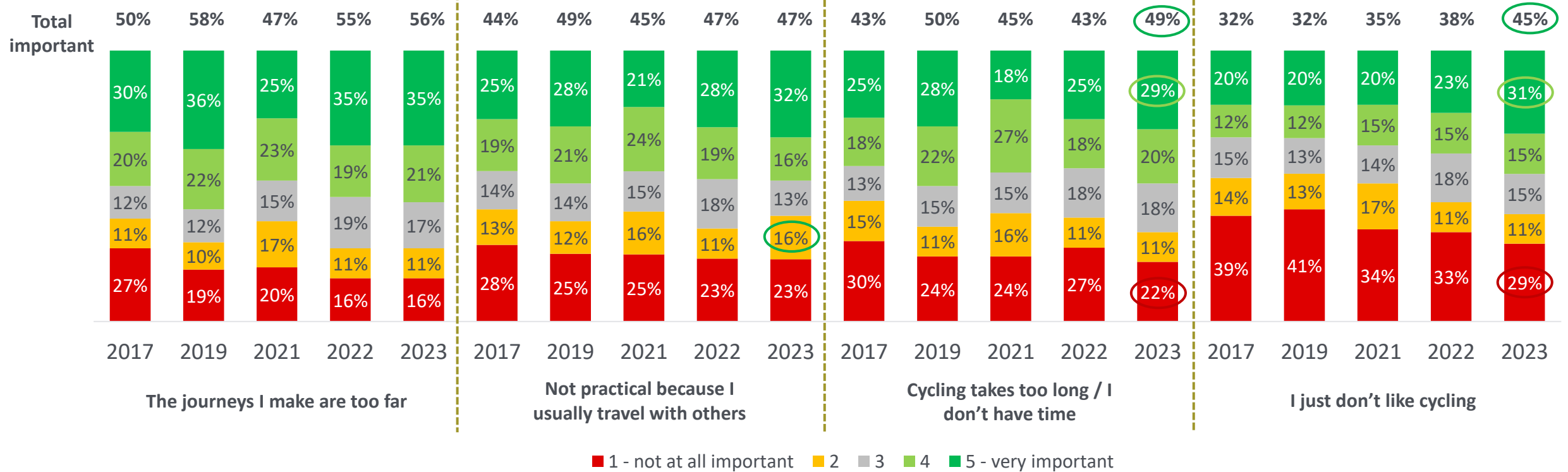
In 2023, poor weather was a less important barrier compared to 2022, but still higher than in years previous



- In 2023, poor weather has seen a decrease in those citing it as an important barrier to cycling (73% v 78% in 2022), although the proportion rating it as important remains higher than in the years prior to 2022. The proportion stating the weather is very important to their views on cycling also remains particularly high (55%).
- This year also saw an increase in the importance of insufficient cycle lanes/traffic free routes compared to 2022 (62% v 57%), bringing it more in line with previous years.

# Attitudes to cycling

The proportion reporting not liking cycling as an important barrier was higher in 2023 than in previous years

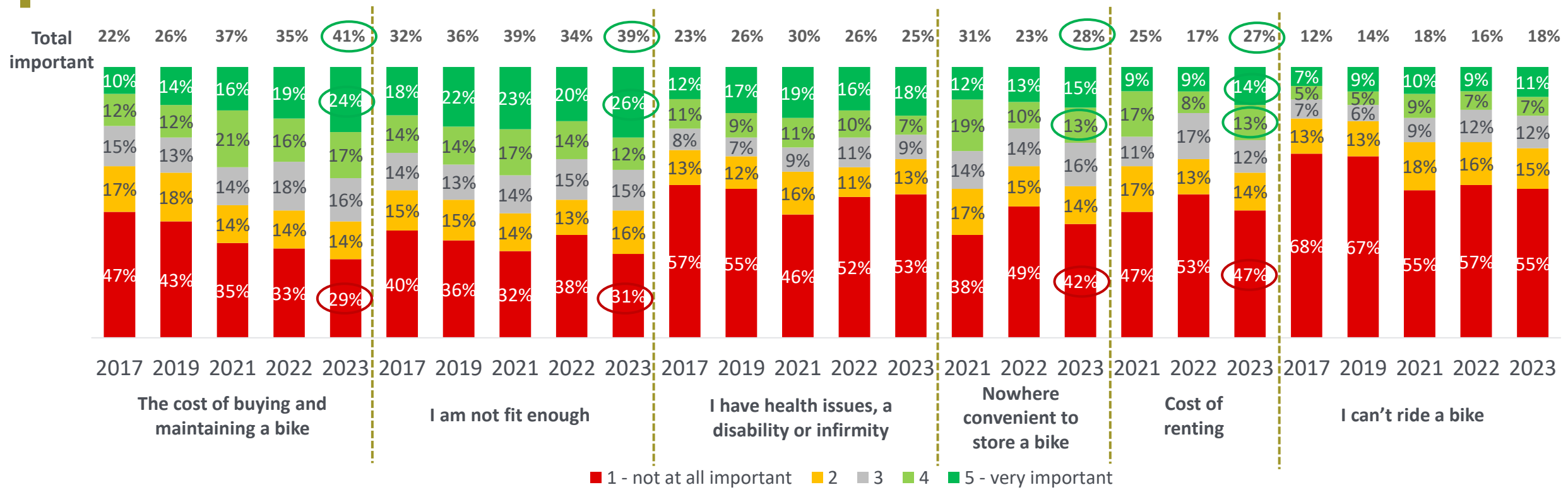


- There were some notable changes to personal barriers in 2023 compared with 2022 results. The proportion reporting cycling taking too long as an important barrier increased (49% v 43% in 2022), particularly in those rating it 5 (very important). Likewise, the same pattern was present in relation to people saying they just don't like cycling, increasing to an all-time high (45% v 38% in 2022).
- The importance ratings given to journeys being too far and cycling not being practical when travelling with others were consistent with previous waves.

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Barriers associated with cost, fitness, renting and storing a bike were more important in 2023 compared to 2022



- In 2023, there were increases in barriers relating to finance and space. The cost of buying a bike (41% v 35%), lack of storage space (28% v 23%) and the cost of renting (27% v 17%) all increased in importance in 2023.
- The proportion of respondents rating not being fit enough to cycle as important has also seen an increase (39%), particularly those giving a 5 (very important) rating.
- The substantial increases in those rating the cost of buying or renting a bike may be linked to the current financial climate and the cost-of-living crisis.

Q11: I am going to read out a list of factors that some people have said puts them off or prevents them from cycling for journeys. For each factor, please tell me how important it is to you in preventing you from cycling more for journeys.

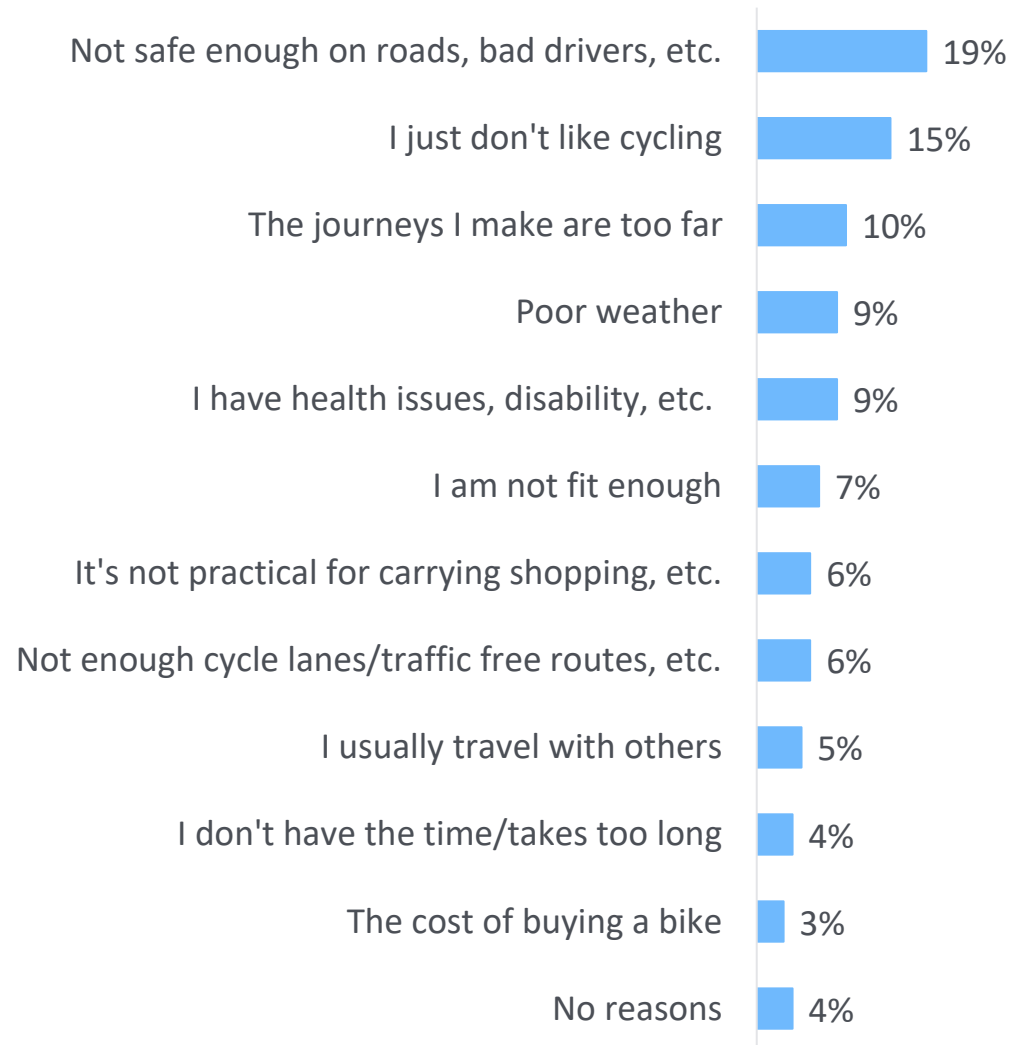
# Attitudes to cycling


## Key barrier to cycling

- All respondents were asked to pick the main reason that prevents them from cycling or cycling more often for journeys.
- In line with previous waves of the research, no single barrier stood out above the others, but the single factor most often selected was not feeling safe on the roads (19%).
- Most barriers were consistent with recent years, with some changes from 2022, including poor weather (9% v 16% in 2022) and not liking cycling (15% v 9% in 2022).
- Cycling infrastructure related barriers saw a rise compared to 2022, with not feeling safe on the roads increasing this year (19% v 13%) as did not enough cycle lanes (6% v 3%) compared with 2022. Although higher than 2022 data, these figures are more consistent with years previous.

Q12: What would be the one main reason that you do not cycle / do not cycle more often for journeys? (Codes <3% not shown.)

## Concern about safety is the main barrier and many also have practicality concerns



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# Segmentation analysis

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## Defining characteristics



- Segmentation analysis was conducted in previous waves to provide insight into groupings in the population in relation to attitudes to cycling.
- The segmentation model was based on: Q1d – frequency of cycling for transport; Q5 – frequency of cycling for leisure; Q7 – propensity to cycle more in the future generally; Q12 – main reason for not cycling more.
- Ten segments were developed based on these questions. This model has also been applied to the 2023 data.

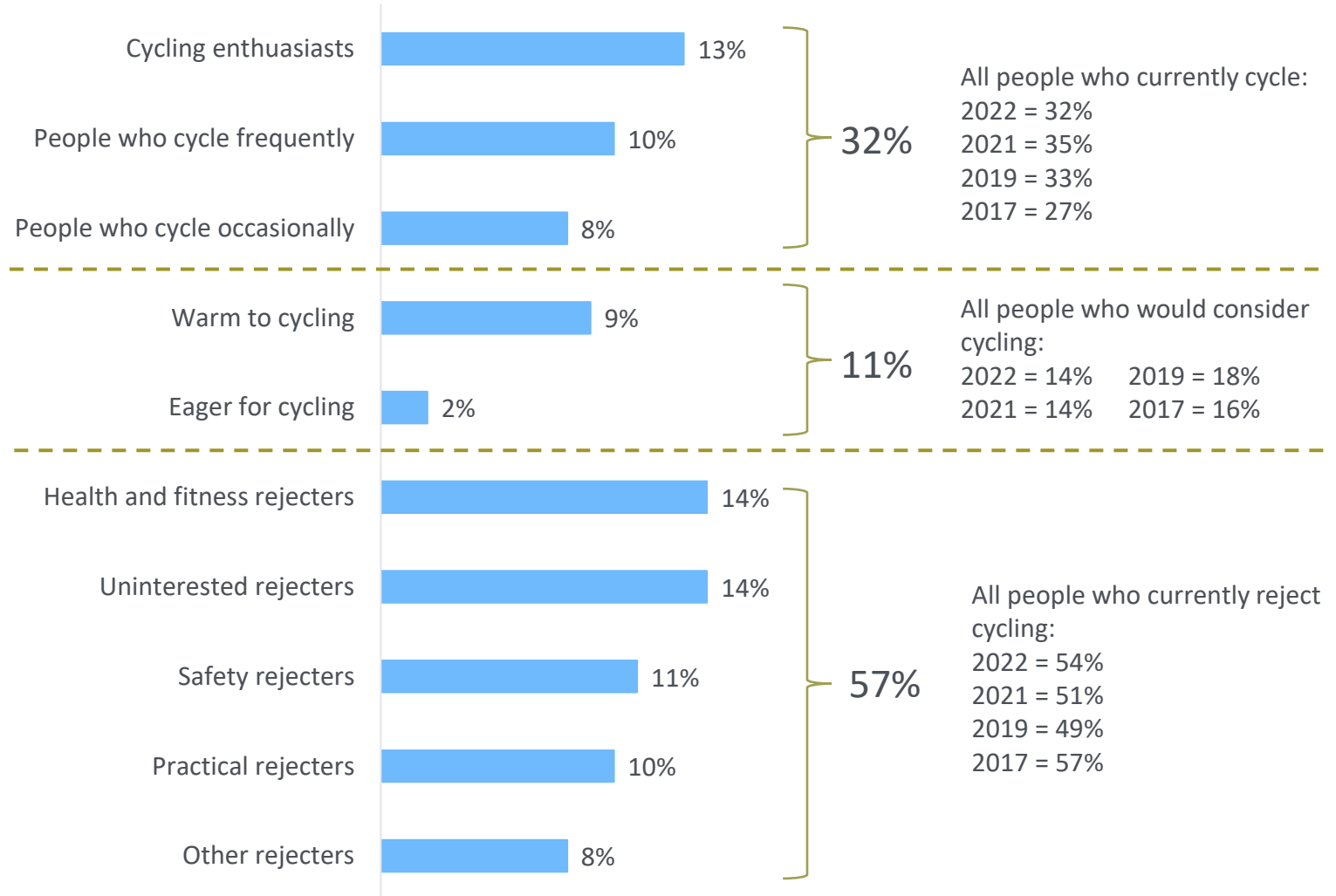
Segment	Defining characteristics
Cycling Enthusiasts	Cycle for transport or leisure <u>at least</u> once a week
People who cycle frequently	Cycle for transport or leisure <u>less than</u> once a week but <u>more than</u> once every 3 months
People who cycle occasionally	Cycle for transport or leisure <u>less than</u> once every three months
<b>Total</b>	<b>All people who cycle</b>
Eager to cycle	Currently never cycle, but <u>high propensity</u> to cycle in next 2 to 3 years
Warm to cycling	Currently never cycle, with <u>moderate propensity</u> to cycle in next 2 to 3 years
<b>Total</b>	<b>All who would consider cycling</b>
Safety Conscious Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years, safety concerns are the main reason
Health and fitness-based Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years, health is the main reason
Uninterested Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years, just don't like cycling
Practical Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years, practical issues are the main reason
Other Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years for a variety of reasons
<b>Total</b>	<b>All who currently reject cycling</b>

# Segmentation



- Consistent with previous recent waves of the tracking research, around one third of respondents reported that they ever cycle, while a further 11% expressed a propensity to cycle in the future, and 57% rejected the idea of cycling – most often because of health/fitness reasons or because they are uninterested.
- Recent waves have seen a decrease in the proportion who would consider taking up cycling (from 18% in 2019) and an increase in rejectors (from 49% in 2019).
- Men were more likely than women to be cycling enthusiasts (20% v 7% women) and frequent cyclists (13% v 7% women). Women were more likely to reject cycling for practical (12% v 8% men) and safety reasons (15% v 7% men) compared to men.
- Cycling enthusiasts also tended to be under 35 years old (23% v 11% 35-54 v 7% 55+).
- C2DEs were more likely to reject cycling due to health and fitness reasons compared to ABC1 respondents (21% v 7% ABC1). ABC1 respondents were more likely to be both cycling enthusiasts (16% v 11% C2DE) and frequent cyclists (13% v 7% C2DE) than C2DE.

The size of most of the segments was consistent with 2022 data, however there's a declining trend in those who would consider cycling



Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037, 2023: 1020

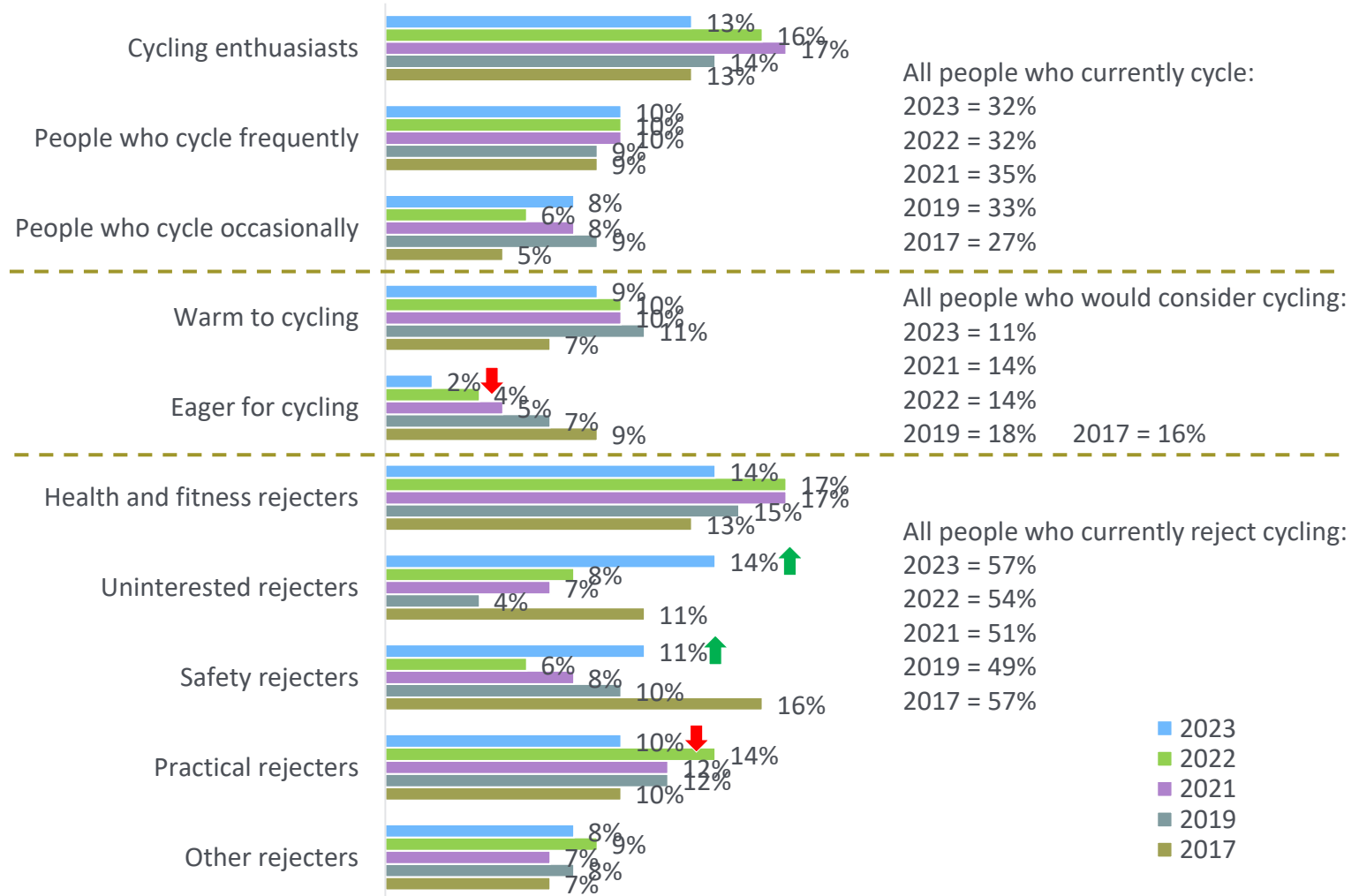


# Segmentation

- The most notable change in the segments in 2023 is the decrease in those willing to take up cycling (from 18% in 2019 to 11% in 2023) and the corresponding increase in cycling rejectors (from 49% in 2019 to 57% in 2023). The decline is most evident in the proportion who are currently non-cyclists but are eager to take it up in future (this has consistently declined over time).
- The segments of those who currently ever cycle (enthusiasts, frequently, occasionally) have been broadly stable.
- In 2023, we saw a decrease in those rejecting cycling due to practical reasons (10% v 14% in 2022), while there was an increase in safety rejectors (11% v 6% in 2022) and uninterested rejectors (14% v 8%).



There were some notable changes in terms of the profile of the rejector segments compared with 2022



Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037, 2023: 1020

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# Summary and conclusions

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- The total proportion of people who ever cycle, either for transport or leisure, has remained stable over recent waves – approximately one in three
- Across the population, however, there seems to be a less positive attitude towards cycling this year
  - Although the majority did agree that they would support the reallocation of road space for cycling in their local area.
- Health benefits remains the key reason why current cyclists travel by bike, with the environment, convenience and cost secondary benefits
- Nevertheless, although understanding of the benefits of cycling is strong, it remains difficult to encourage individuals to overcome their barriers
- Many do not personally associate with cycling and the demographic profile of those with more negative views is consistent over time

# Thank you

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# Technical appendix

## Quantitative: method and sampling

The data was collected by face-to-face CAPI interviews.

The target group for this research study was a representative sample of the Scottish population. The variables used to define the sample as representative of the target group were age, gender, SEG.

The sample type was non-probability. Respondents were selected using a stratified random sampling technique, where interviewers worked to specified quota controls on key sample criteria, and selected respondents randomly within these quotas.

The target sample size was 1,000 and the final achieved sample size was 1,020. The reason for the difference between these two samples was to allow for slight overage (in case sample was removed following data quality checks).

Fieldwork was undertaken between 20<sup>th</sup> September and 11<sup>th</sup> October 2023.

The sample provides a robust and representative sample of the population when compared to Census 2021/2011 statistics (as not all 2021 data has been released at this point).

In total, 22 interviewers worked on data collection.

Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by telephone or email) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.

The final data set was not weighted as the targets by age, gender and SEG were met.

Quota controls were used to guide sample selection for this study. This means that we cannot provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample.

The overall sample size of 1,020 provides a dataset with an approximate margin of error of between  $\pm 0.61\%$  and  $\pm 3.07\%$ , calculated at the 95% confidence level (market research industry standard). Each sub sample of 100 provides a dataset with an approximate margin of error of between  $\pm 1.95\%$  and  $\pm 9.80\%$ .

The following methods of statistical analysis were used: Z tests, t-tests.

All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.